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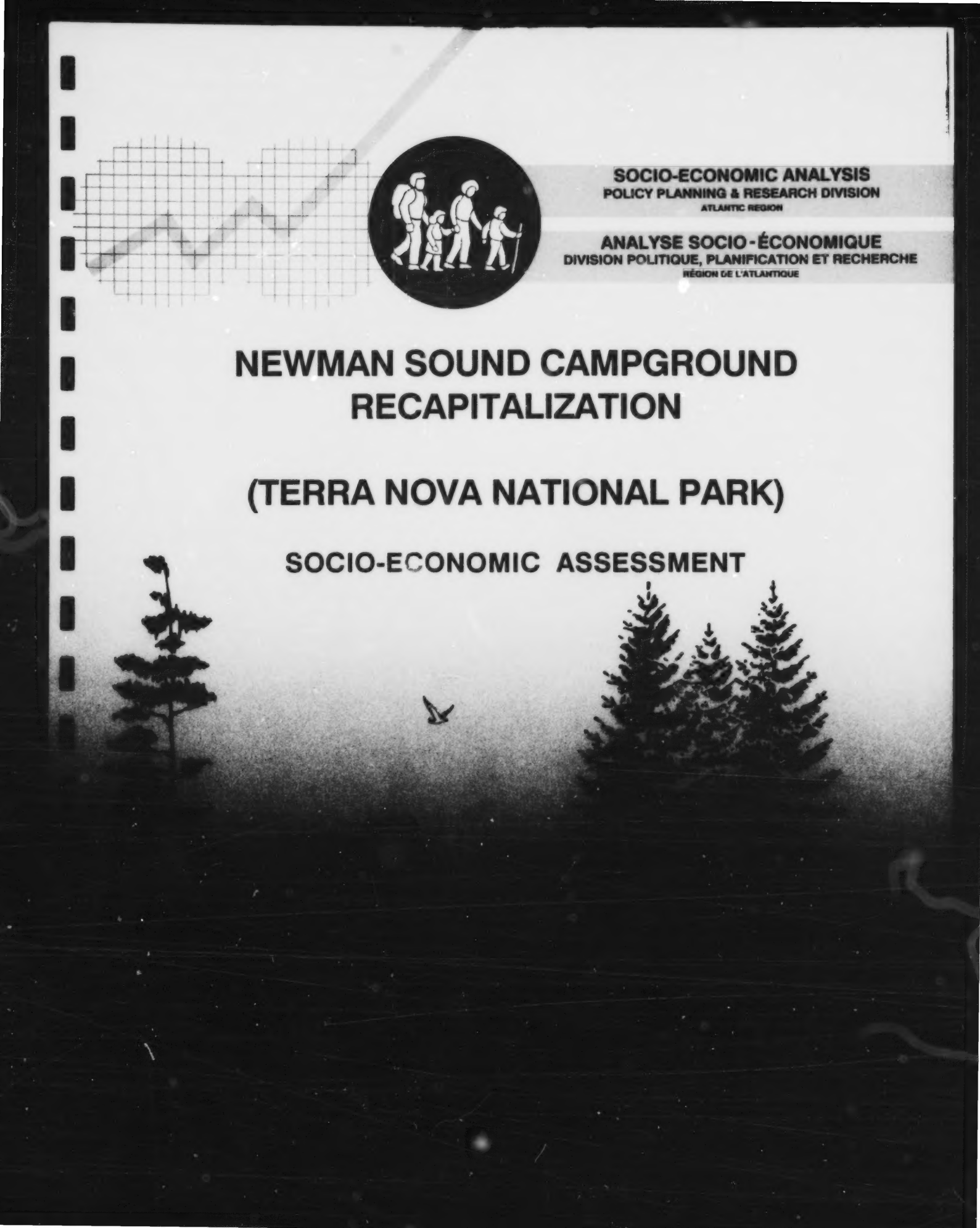
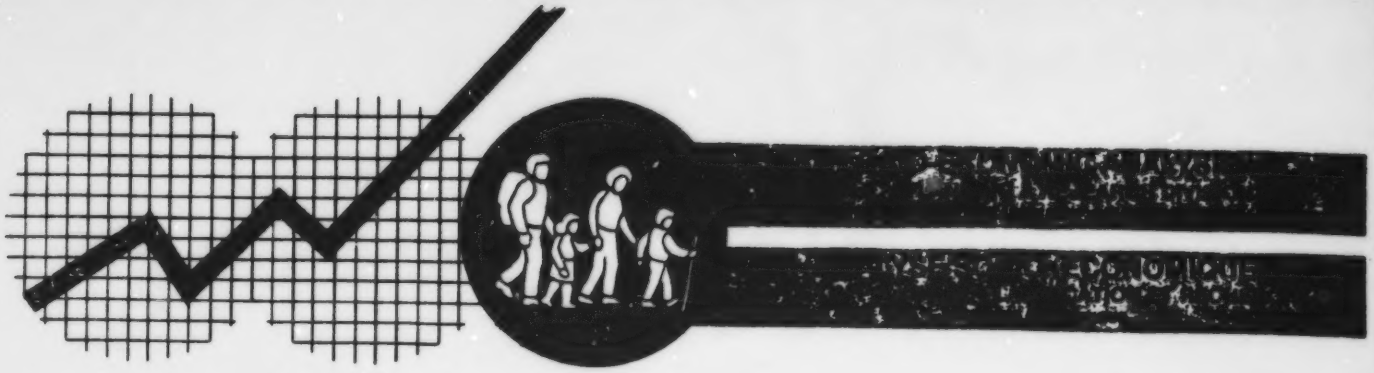
RÉGION DE L'ATLANTIQUE

NEWMAN SOUND CAMPGROUND RECAPITALIZATION

(TERRA NOVA NATIONAL PARK)

SOCIO-ECONOMIC ASSESSMENT





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SOCIO-ECONOMIC ASSESSMENT

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March 1990

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PREFACE

Atlantic Region Socio-Economic Analysis was commissioned by Architecture and Engineering (PWC) to carry out a Socio-Economic Assessment of the proposed Newman Sound Campground Recapitalization. A major survey of campers was carried out during the summer of 1989 to assess the current camping market in terms of their needs and satisfaction with the existing products and services.

This study was truly a team effort. Park management and Regional office landscape architects and engineers worked with socio-economic staff to develop a questionnaire that would provide the basis of information for the assessment. Park staff distributed the surveys at the kiosk. These surveys were later processed and linked to the camper registration data. Literally thousands of pages of computer print-outs were compiled and analyzed to produce this final report.

This socio-economic assessment represents only one part of the project planning requirements. Through the use of sound visitor data, Terra Nova will be able to better match the product with the needs of its campers. Other processes, such as the Environmental Assessment and Review Process, will ensure the environment can support these developments.

EXECUTIVE SUMMARY

THE NEED FOR RECAPITALIZATION

Engineering assessments have shown that the age of Newman Sound Campground and its intensive levels of use have left the campground in a 'run-down' state. **The 1989 camper survey clearly shows that the needs and expectations of the majority of campers are not being met by this facility.**

- **more than 250 negative comments were provided by the campers** on the 700 returned questionnaires (Appendix A). The extent of this negative reaction is unusually high for the Canadian Parks Service (CPS). It is suspected that the high rate of repeat clientele and their familiarity with the campground influenced this atypical response.
- **poor site maintenance, confused campground design, location of washrooms, insufficient laundry facilities and lack of serviced sites were among the major concerns.** Some segments indicated a need for additional screening, larger sites, more playgrounds and improved circulation.

PROFILE OF CAMPERS

- two thirds of Newman Sound campers use drivable or towable camping equipment
- the **average length of stay of 3.09 nights** at Newman Sound is longer than most CPS campgrounds
- over 70 per cent of the campers are repeat users
- the **predominant user group is 'destination campers'** . Most within this group are families with children who use few park programs and facilities outside of the Newman Sound area
- twenty per cent of the campers **would have stayed longer if they could have obtained service sites.** This increase in length of stay alone would result in an increase of 30 per cent in campground demand
- of those who want service hookups, 20 per cent wanted electrical, 40 per cent electrical and water and 40 per cent full services.

MARKET POSITION

The park offers a relatively homogeneous camping product in terms of site size, level of service, site access etc. **The market however is not homogeneous** serving at least four distinct market segments: destination campers, luxury campers, traditional campers and heavy facility users.

Product Diversification is necessary to respond to the market's needs. The park is positioned amongst two thirds of the province's campgrounds in terms of similar product offer (see page 49). There is only one 'natural park' offering serviced sites in the province (Grand Codroy Provincial Park on the province's west coast) and over 40 with a similar offer to Terra Nova. Over 90 per cent of the province's commercial campgrounds offer serviced sites, however, their market position differs considerably from provincial and national parks in terms of the type of recreation, leisure and educational opportunities available. **The survey results demonstrate a considerable demand in the "natural park-serviced site segment".**

OPTIONS ANALYSIS

Two options emerged:

Option A would provide the necessary environmental rehabilitation and improvements to buildings and services necessary to meet CPS campground standards. The park would continue to offer only unserviced sites. The cost of this option was estimated to be $2 million.

Option B would provide all of the components of Option A. In addition, 170 unserviced sites would be replaced with 40 sites offering electric hookups and 130 sites with electric/water hookups. The balance of sites would remain unserviced. These numbers are based upon demonstrated demand. The total cost of Option B would be $2.8 million.

- There is considerable difference in revenue generated between these two options. Serviced sites increase revenue by about $130,000.00 per year (65 per cent more than unserviced sites).
- **Using a life cycle cost model to compare the two options , both are roughly equal in terms of net discounted costs.**(see fig. 39, p. 57)
- Due to the extent of the work required, phasing of construction over a 5 year period is necessary with priority going to environmental rehabilitation.
- The option of full service hookups was dismissed due to extremely high cost (eg. 3 times the cost of Option A).

SURPLUS DEMAND

Some sites have to be made larger to accommodate today's camping equipment. There is also a requirement to remove about 30 sites from an area where their use threatens the environment. **It was assumed in this analysis that the number of sites would be reduced from 387 to 330.** This will result in surplus demand for camping at Newman Sound. Approximately 65 per cent of Newman Sound campers indicated they would camp at Malady Head if they could not obtain a site at Newman Sound.

RESOURCING

Apart from the capital costs, additional resources have to be allocated to operation and maintenance of the campground to meet the needs of campers. Site maintenance was seen as the highest single priority by campers. The projected increase in use will accentuate this problem unless adequate resources are provided.

ECONOMIC IMPACT

Option A results in $1.96 million in labour income with an associated 75.4 person years of employment during the 5 year period of construction. Option B would result in $2.7 million in labour income with 104 person years employment.

Campgrounds contribute to about 60 per cent of the total visitor expenditures made in the park region.

From a competition stand-point, there would appear to be no reason why Terra Nova should not offer serviced sites (figure 35).

RECOMMENDATIONS

Based on this socio-economic assessment it is recommended that:

- Option B be adopted, subject to a positive environmental assessment and review. From the perspective of trends, visitor satisfaction, demand and cost effectiveness, Option B can deliver the best overall product.
- camping activity be continually monitored with particular emphasis placed on determining the level of unsatisfied demand (ie. those wanting to camp in Newman Sound but unable to get a site).
- measures to alleviate surplus demand (ie. adding to the size of the campgrounds) not be implemented until after the recapitalization is complete. At that time, park management will be in a better position to evaluate the options.
- construction be phased over a 5 year period. This provides longer term economic benefits (stability) to the region.

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CHAPTER 1.0 INTRODUCTION

1.1 Park Setting

Terra Nova National Park, established in 1957, is the most easterly national park in Canada. It is characterised by many inlets, sounds, coves and arms along the Atlantic Coast. Its rolling hills, which form part of the Appalachian Mountain System, are interspersed with numerous lakes, rivers and bogs. The Trans-Canada Highway passes through the park, 240 km north of Newfoundland's largest city, St. John's. There are also 22 communities in the immediate park area.

Activities available in the park include, interpretation programs, hiking, sight-seeing, golf, fishing, boating, canoeing, and swimming. There are two privately operated amusement areas next to the park which are popular with campers. Winter activities include snowshoeing, cross-country skiing and winter camping.

Terra Nova National Park has two campgrounds. Newman Sound, the main campground, consists of 387 campsites covering 50.5 hectares near the North Atlantic. The campground has 20 interconnected loops with no hookups. Centrally located washrooms, showers, kitchen shelters, water and sewage disposal facilities are available. There are playgrounds and a concession-operated store and laundromat.

Malady Head Campground, the least used of the two, has 165 campsites with central services. It is in the north end of the park, farther from the main recreation areas but nearer to communities and a large amusement park. Both campgrounds offer interpretive theatres and programs.

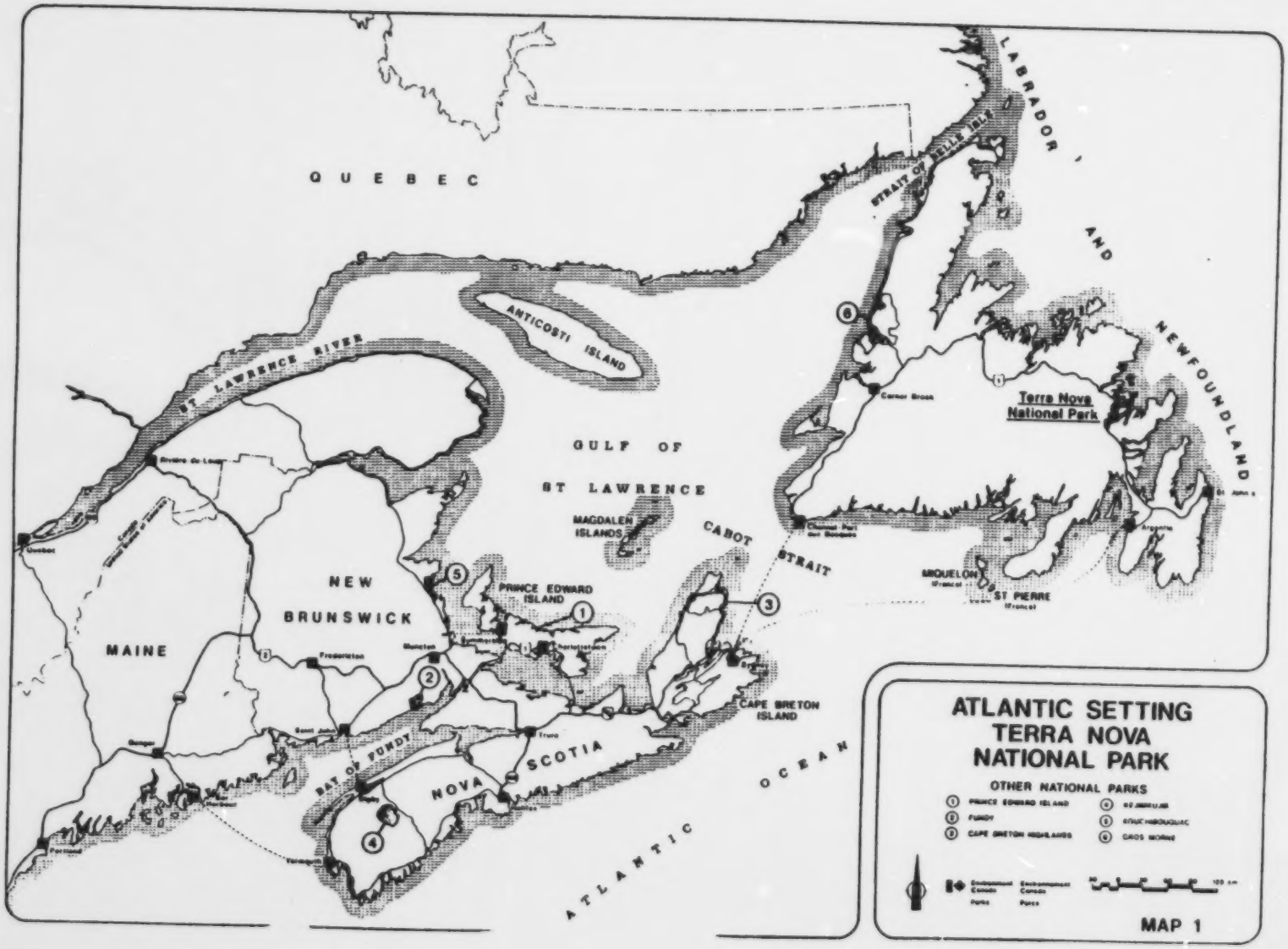

QUEBEC
LABRADOR
AND
NEWFOUNDLAND
STRAIT OF BELLE ISLE
ANTICOSTI ISLAND
ST LAWRENCE RIVER
GULF OF
ST LAWRENCE
Terra Nova
National Park
MAGDALEN
ISLANDS
CABOT
STRAIT
MIQUELON
ST PIERRE
NEW
BRUNSWICK
PRINCE EDWARD
ISLAND
MAINE
CAPE BRETON
ISLAND
BAY OF FUNDY
NOVA
SCOTIA
ATLANTIC
OCEAN
ATLANTIC SETTING
TERRA NOVA
NATIONAL PARK
OTHER NATIONAL PARKS
MAP 1

FIGURE 1

CHAPTER 2.0 STUDY PURPOSE AND OBJECTIVES

In 1985, an assessment of Newman Sound Campground was carried out by Canadian Parks Service Engineers and Park Management. The assessment revealed that the campground was well behind campground standards offered at other National Parks in Atlantic Region. Thirty years of intensive use have left Newman Sound campground outmoded and showing considerable decline in environmental quality. The campground is scheduled to undergo extensive recapitalization over the next 5 years.

The recapitalization of the campground may cost more than $2 million, depending on the option chosen. The scope of this investment necessitates a thorough understanding of the camping market.

The purpose of this study is to provide an analysis of the Park's current and potential camping market, providing management with information related to the needs of visitors and the economic implications of the recapitalization project.

The study objectives are as follows:

- to determine the facility and service requirements of campers based on current and projected demand
- to determine the overall impact of the planned reduction of sites on camping in the park, in particular on Malady Head
- to determine the most cost effective recapitalization option
- to determine which other activities or facilities could be included in the recapitalized campground
- to determine the level of use of existing facilities
- to determine the campground's market position relative to the segments it serves and assess the implications of the proposed recapitalization on the market position

Since actions taken at Newman Sound will have an impact on the use of Malady Head, both campgrounds were considered in this study.

CHAPTER 3.0 DEVELOPING A MARKET SENSITIVE PRODUCT

Terra Nova's campgrounds were built in the early 1960's when the camping market was predominated by tents and tent trailers. As such the sites are small, and the park's campgrounds are generally suited for a homogeneous market of tenting campers. Today, the camping market is far from homogeneous.

Levels of use are poor indicators of customer satisfaction

On a cursory level, Newman Sound Campground would appear to be performing well. The campground realizes a very high rate of repeat use. **Newman Sound also has a respectable occupancy rate** that surpasses many other national park campgrounds in the Atlantic Region. Its proximity to Newfoundland's major urban areas, coupled with its well developed recreational facilities result in high levels of use, though the campground standards are not as high as in other national parks. However, as will be shown in this study, **levels of use are false indicators of user satisfaction.** The current study measures the campground's performance using measures of 'customer satisfaction' and 'perceived importance' of the products and services offered.

Environment-Economy

Two other factors must be considered; environmental protection and economic viability. Economic viability of the park and its environs are inextricably linked with protection and preservation of the park's resources. **Newman Sound has encountered serious environmental problems. Pollution of Newman Sound (the water body) is by far the most serious of the environmental problems. The campground itself faces dumping of waste water in an uncontrolled fashion, compaction and damage to vegetation due to sites being to small, and overall deterioration of the environment due to high levels of use. The selected option(s) for recapitalization will undergo an extensive Environmental Assessment (EARP).**

From an economic perspective there are several factors that must be considered. First, there is a point at which **recapitalization is necessary to ensure the long term viability of the asset**. Secondly, **consumer behaviour is dynamic by nature. For this reason the supply of goods and services must adapt to meet changes in demand.** If the product offer does not match demand, consumers may seek to substitute the product. This loss of market share will result in a loss of revenue while the fixed costs remain constant; therefore, a low profitability. Thirdly, **by not offering the products or services people desire and are willing to pay for, revenue is forgone.** Serviced sites for example generate about 60 per cent more revenue than unserviced sites. Finally, the capital cost must be considered. Cost effectiveness of the investment will be an important criteria in the final management decision concerning the recapitalization of Terra Nova's campgrounds.

CHAPTER 4.0 STUDY APPROACH

Data Base

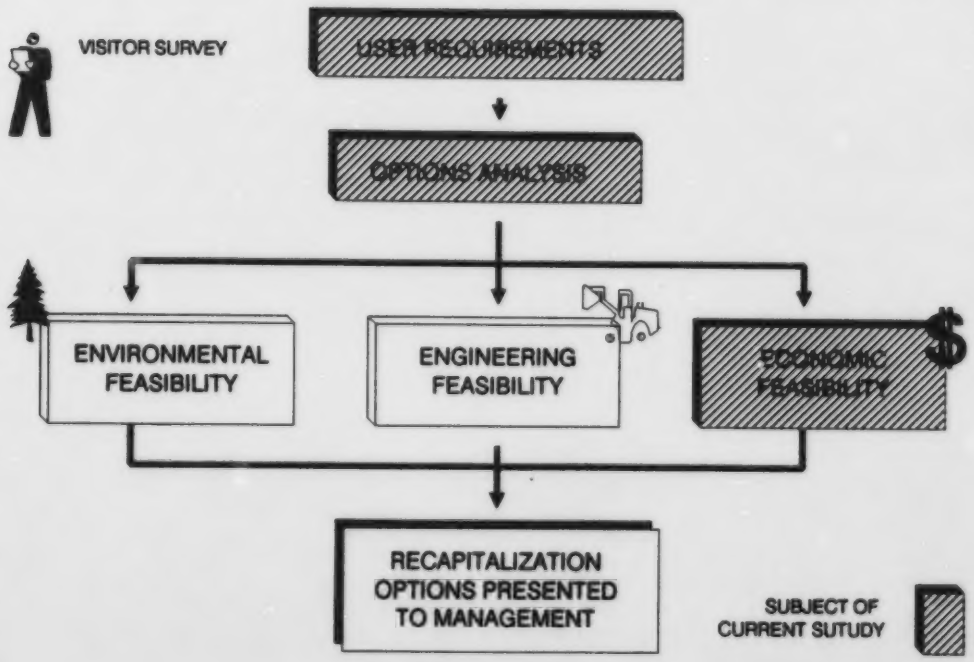
The basis of this analysis was a survey of campers conducted during the 1989 peak camping season. In total, about 1000 questionnaire booklets were returned. The returned questionnaires were then weighted to the camper registration data retained for all campers. A detailed planning report is available which documents the survey methods used in this study (de Lange, D. , *Terra Nova N. P. Camper Survey Planning Report*, Canadian Parks Service, Atlantic Region 1989).

Analytical Methods

The current study was carried out in two distinct phases. First the user requirements were determined through analysis of the survey data. On the basis of user requirements, engineering studies and environmental rehabilitation criteria, options were developed and costed by a study team consisting of engineers, landscape architects, socio-economic analysts and park management. The most cost effective option was then determined through the use of a discounting model. Finally, the economic impact of the selected option was determined.

FIGURE 2

CONTEXT OF SOCIO-ECONOMIC ASSESSMENT



CHAPTER 5.0 USER MARKET PROFILE

5.1 NEWMAN SOUND CAMPGROUND

5.1.1 SEASONAL OCCUPANCY

Over three quarters of the campground's use occurs during the months of July and August. The occupancy rates for July and August 1989 were 77 and 63 per cent respectively. The balance of the camping season shows a relatively poor performance, with occupancy rates between 12 and 16 per cent. During the entire peak and shoulder camping season, long weekends surge to capacity.

The pattern of use experienced by Newman Sound is typical of a campground within a few hours driving distance of a major urban area (Kejimkujik and Fundy have similar patterns).

Figure 3 illustrates a typical loading pattern for the month of May. Following the May long weekend, campground use declines considerably. It should be noted that the park modifies the campground's resource levels accordingly by opening fewer loops and retaining fewer staff in the campground during this period. Furthermore, only one campground is open in the park during the off season (and is open year-round). Figures 4 through 7 illustrate the daily loadings throughout the balance of the camping season.

FIGURE 3

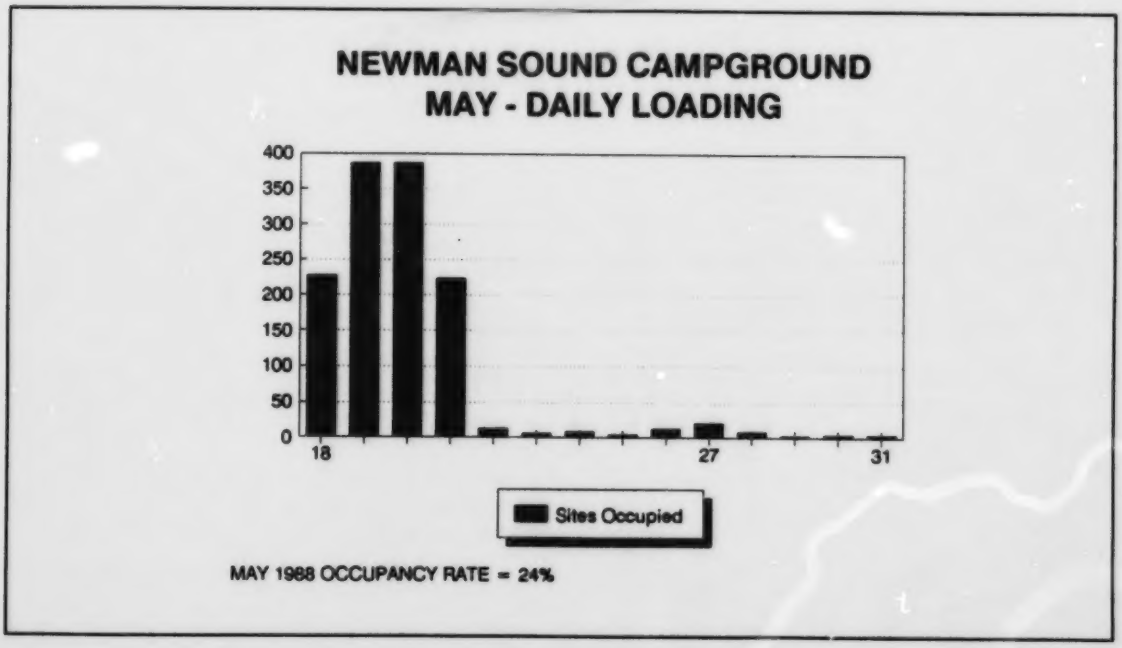


FIGURE 4

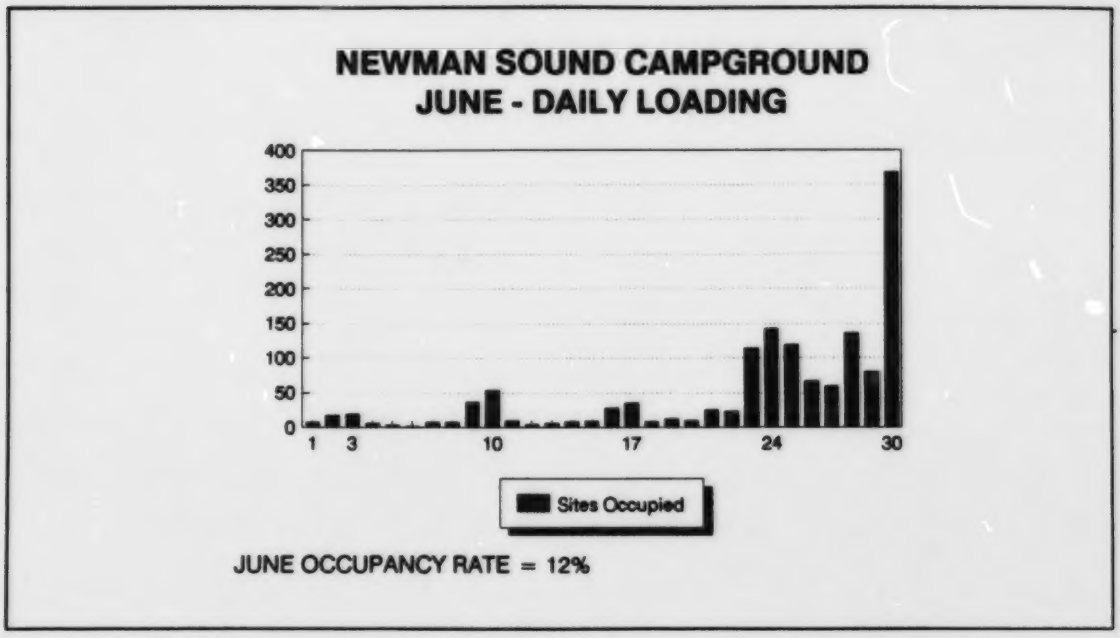


FIGURE 5

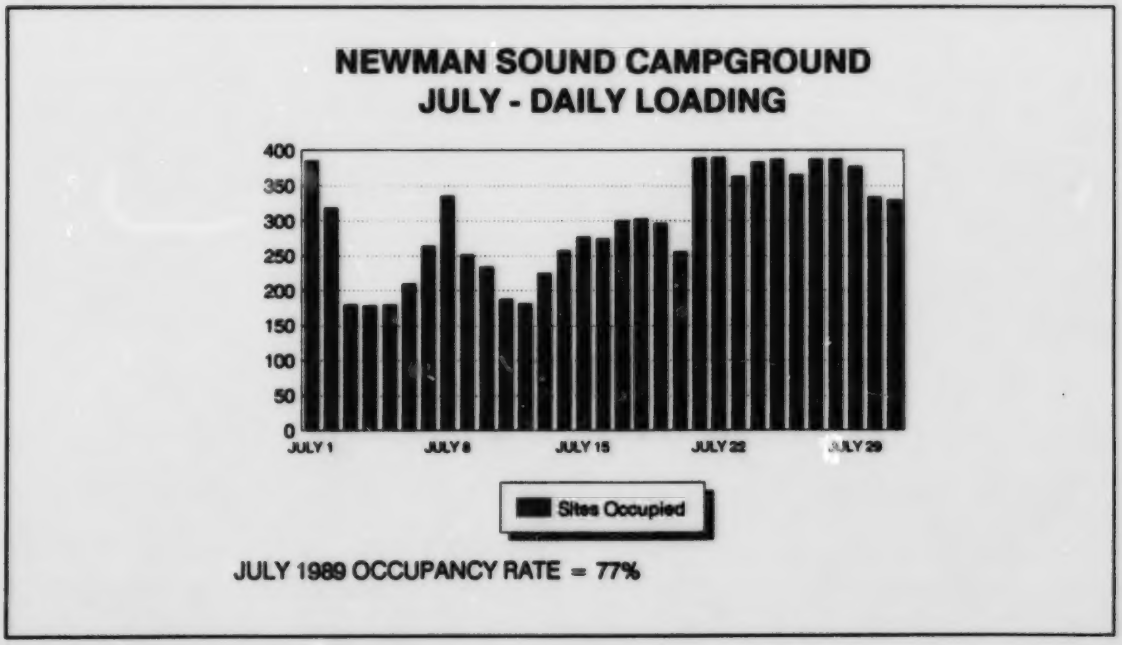


FIGURE 6

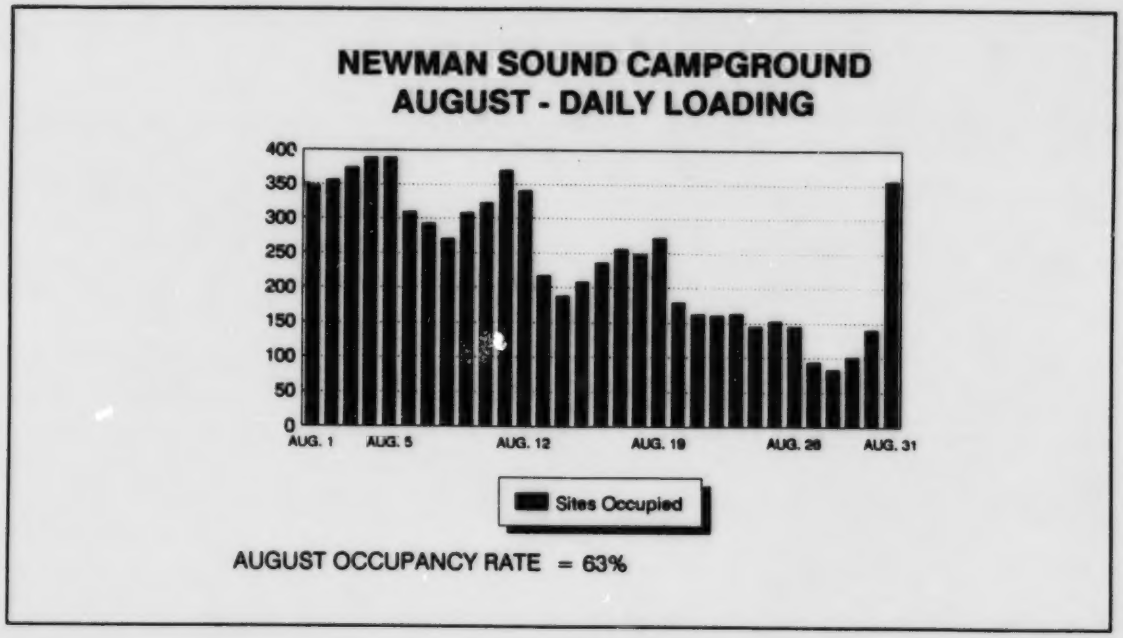
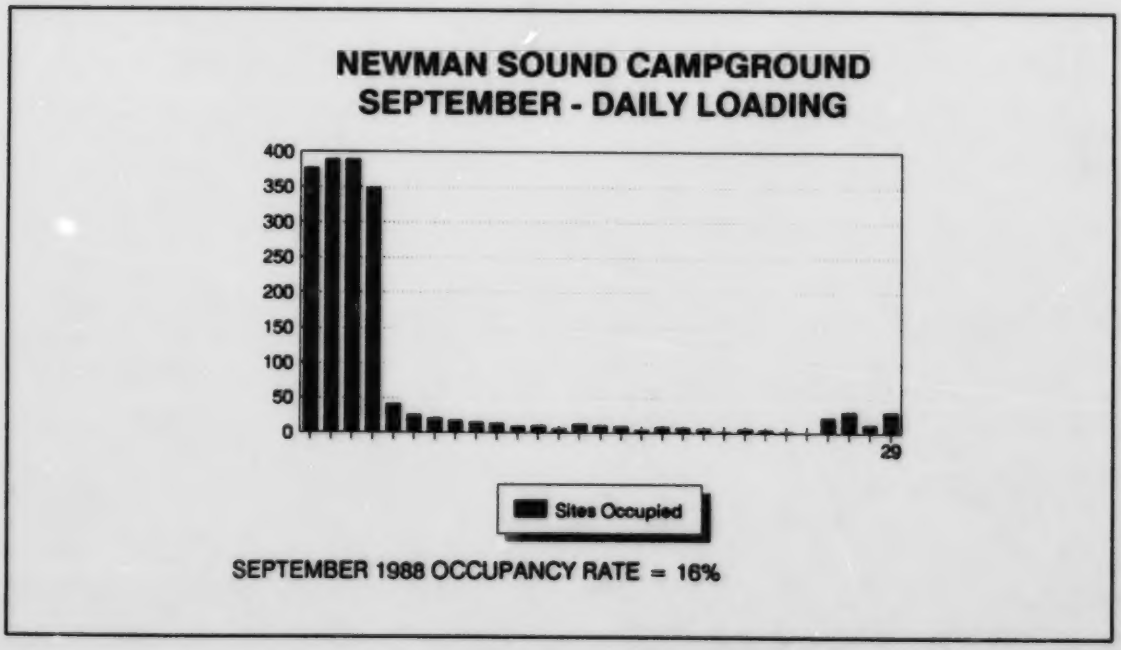


FIGURE 7

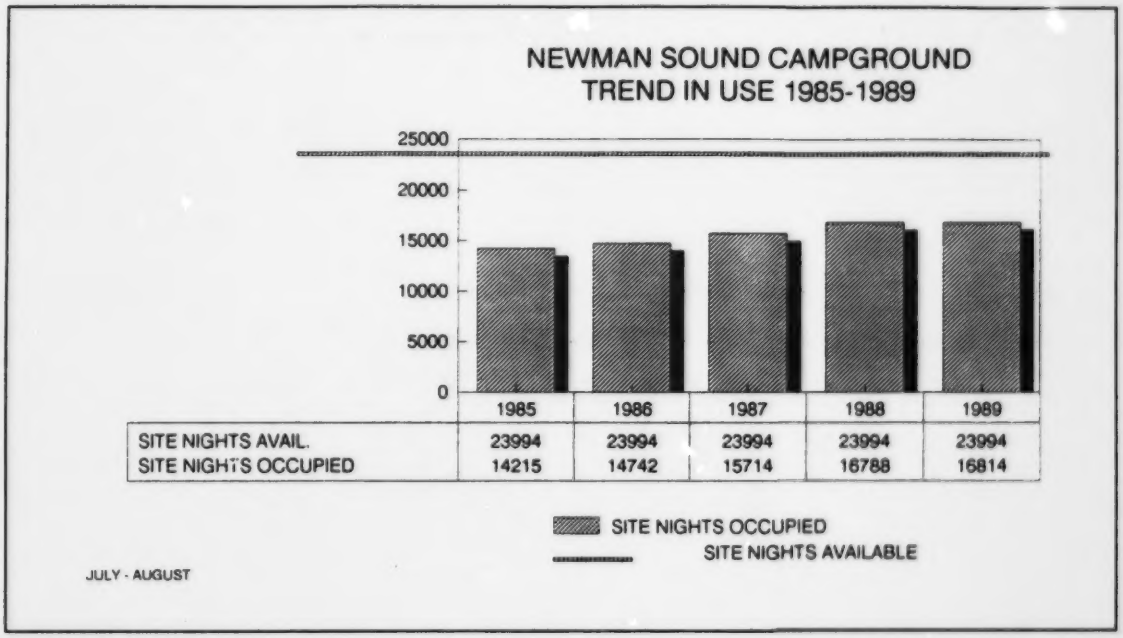


5.1.2 TREND IN USE

Camping at Newman Sound has followed the general trend in camping experienced throughout North America. From the mid-1970's through 1985, Newman Sound campground's use continually declined. During this period, Newman Sound's peak season occupancy rate ranged from a high of 85 per cent to a low of 58 per cent. Since 1986, Newman Sound's occupancy levels have rebounded to about 70 per cent.

This trend is typical of the entire camping market in North America, not necessarily the result of a poorly maintained facility. The camping market faced increased supply of

FIGURE 8



campgrounds while the demand for camping was slowing down along with the entire "rubber tire" travel market. There would appear to be a correlation between economic factors, such as cost of energy, disposable income etc. and the propensity to travel.

5.1.3 ORIGIN AND REPEAT USE

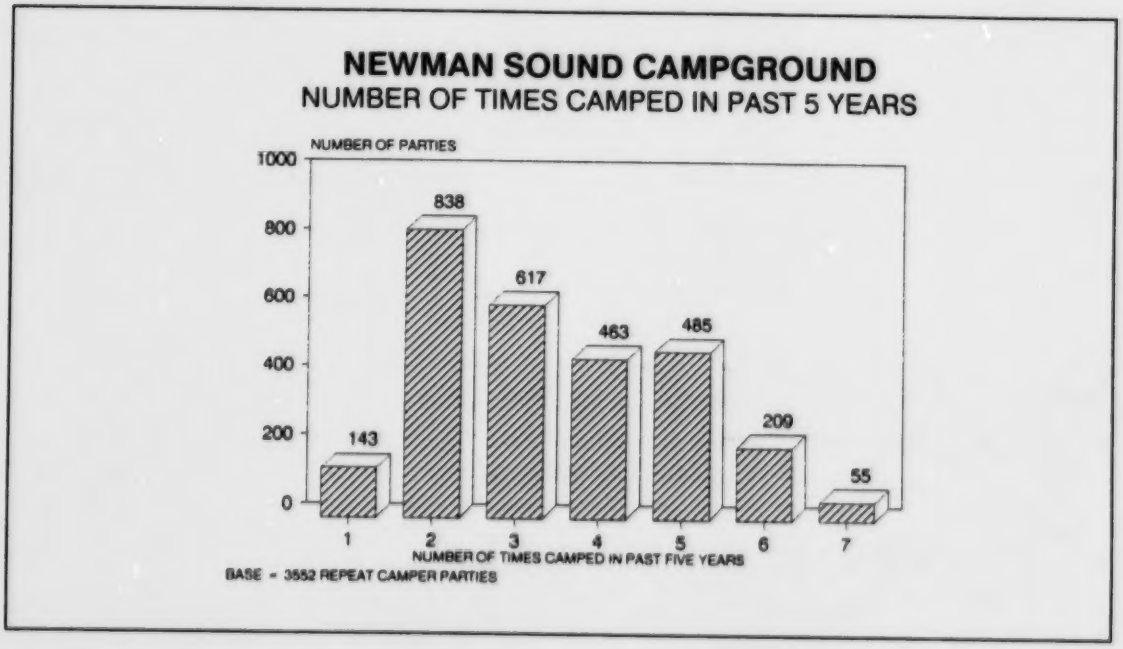
During the peak camping season there were approximately 5440 camper parties[1] who used Newman Sound Campground. Approximately *82 per cent of the camper parties were from Newfoundland.*

It is therefore not surprising that *almost 70 per cent of the Newman Sound camper parties had camped in Terra Nova previously.*

Over 90 per cent of the repeat camper parties were from Newfoundland.

Of the *3550 repeat parties*[2], *620 had camped there earlier the same year, 1635 camped there in 1988 and 450 parties camped there in 1987. Figure 9 shows that during the previous five years, most of the repeat parties camped in Newman Sound Campground between two and five times.*

FIGURE 9



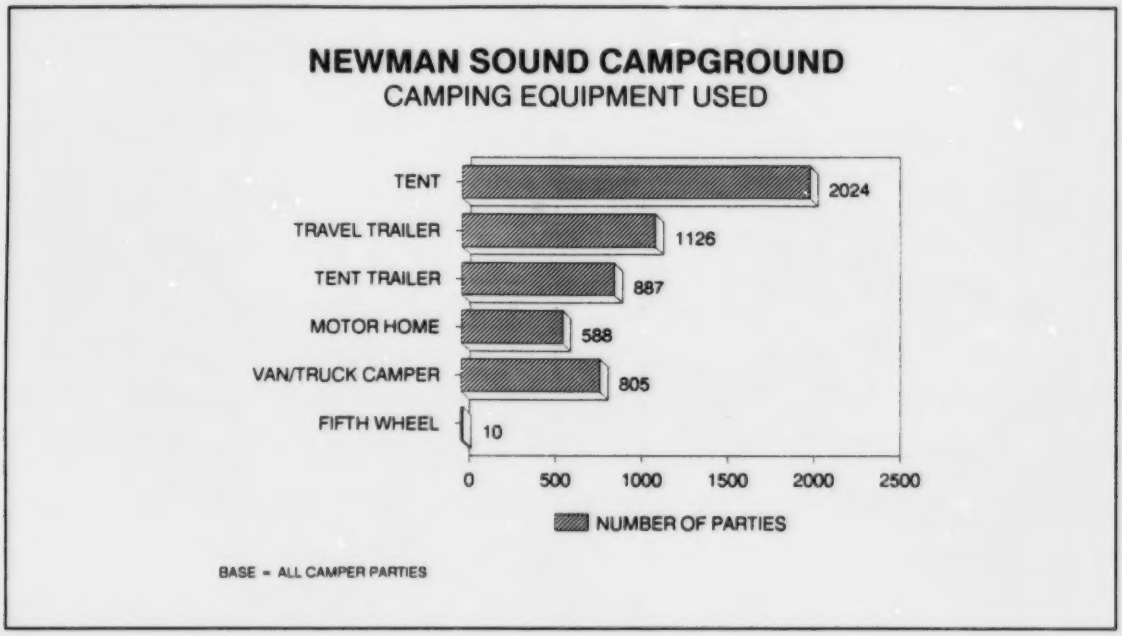
1 A **camper party** consists of a group (eg. family, friends etc.) or an individual registered to a single site.

2 All absolute values quoted in the text have been rounded-off to facilitate reading. Furthermore, quoting computed values (eg 3147 as opposed to 3150) implies a precise value, when in fact the value is an estimate within a margin of error.

5.1.4 CAMPING EQUIPMENT USED

Almost two thirds (63%) of the Newman Sound camper parties used drivable or towable camping equipment. Figure 10 illustrates the types of equipment used. The single largest equipment category is tents, which account for 37 per cent of the equipment used.

FIGURE 10



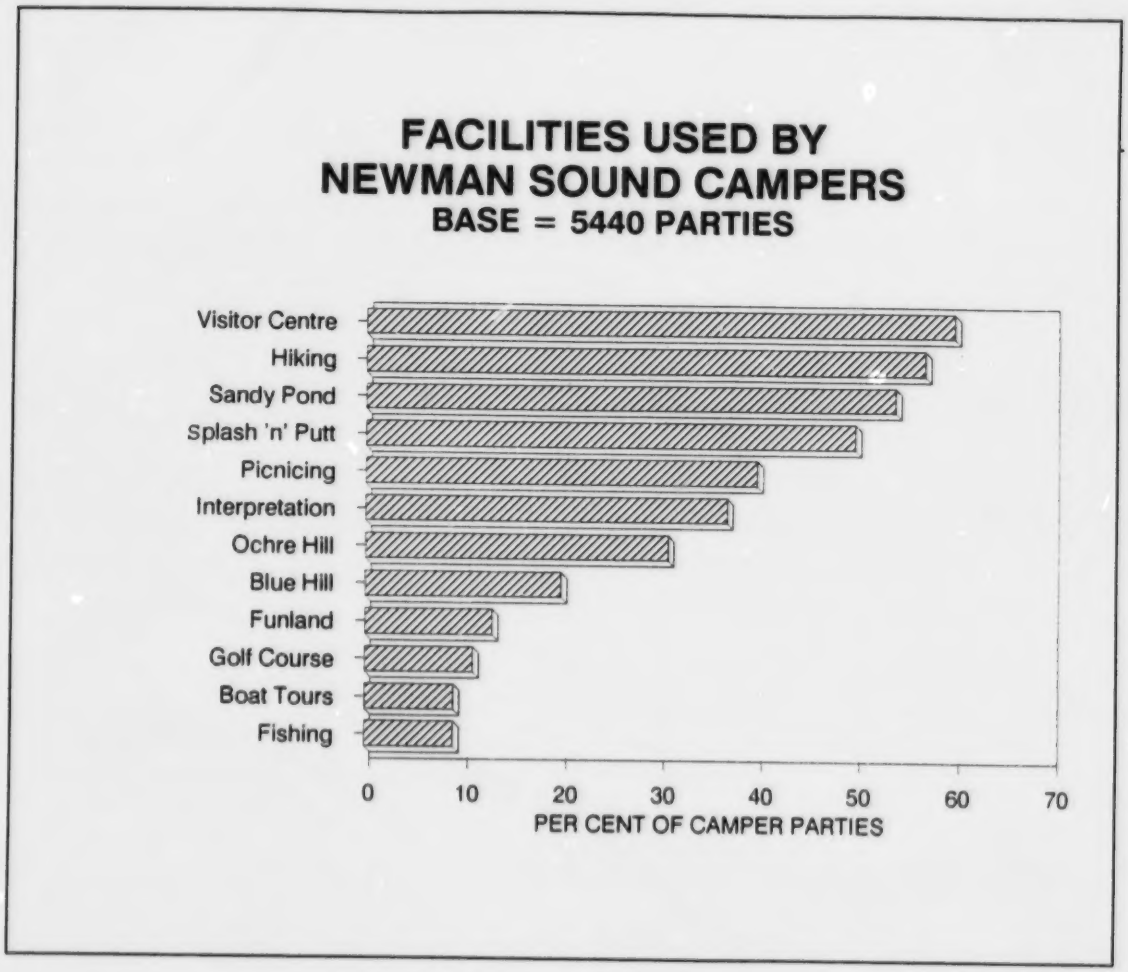
5.1.5 LENGTH OF STAY

The mean length of stay at Newman Sound Campground during the peak camping season was 3.09 nights. About 30 per cent of campers stayed one night, 25 per cent two nights and 45 per cent stayed three or more nights.

5.1.6 FACILITIES USED BY NEWMAN SOUND CAMPERS[3]

Figure 11 below , illustrates the relative use by Newman Sound campers of the facilities and services available in or near the park. These relate only to the camper's current trip (ie. did not include use of facilities etc. on previous visits).

Figure 11



3 When interpreting the results of the facility use question, note that the question relates to "one or more members of the party" using the facility and not necessarily all members of the party. The question was used to provide a *relative* evaluation of facility use. In order to simplify reading of the text, reference is made to camper parties as opposed to "one or more members of the party" , even though the latter is more accurate.

Visitor Reception Centre

- Over 60 per cent of Newman Sound camper parties entered one of the park's visitor centres.
- Park records indicate that the Newman Sound visitor centre was visited by almost 10,000 individuals during 1989.
- Two thirds those who entered the visitor centre were repeat users of the park.
- Seventy-five per cent of Newman Sound's out-of-province campers entered the VRC compared to 59 per cent of the campers from Newfoundland.

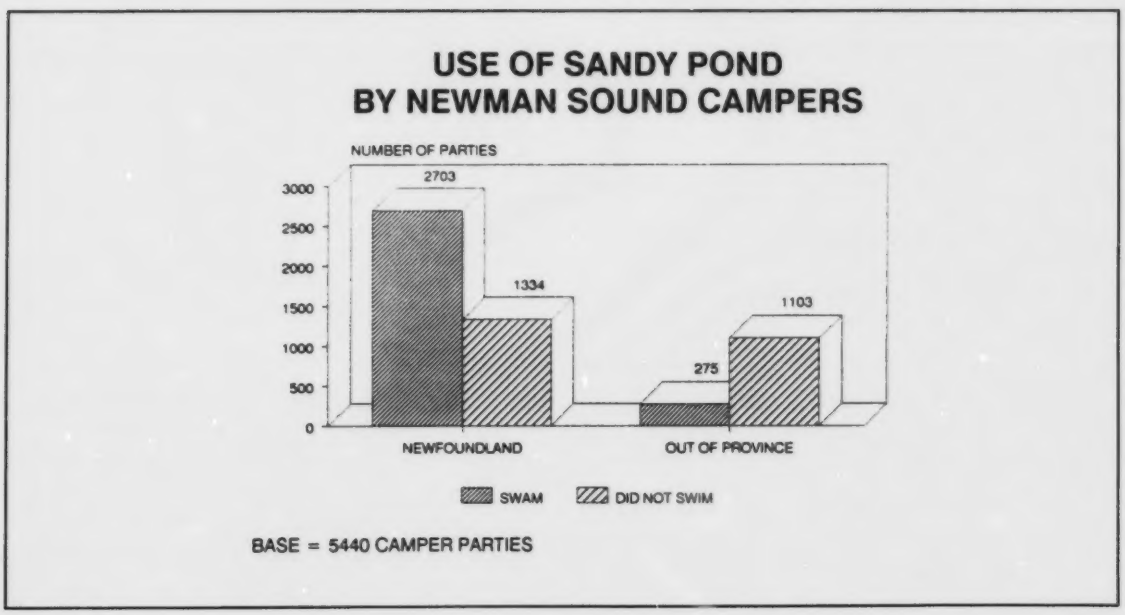
Hiking

- The majority (57%) of Newman Sound camper parties indicated that they hiked during their stay in the park.
- There was minimal difference in the percentage of hikers who were first time visitors compared to repeat visitors. The survey did not measure the type or extent of hiking. This will be the focus of a separate survey next year.

Sandy Pond

- As shown in Figure 12, the overwhelming majority (91%) of the Newman Sound camper parties who used Sandy Pond were from Newfoundland.
- *Only 20 per cent of the out of province campers used Sandy Pond* compared to 66 per cent of Newfoundland campers.

FIGURE 12



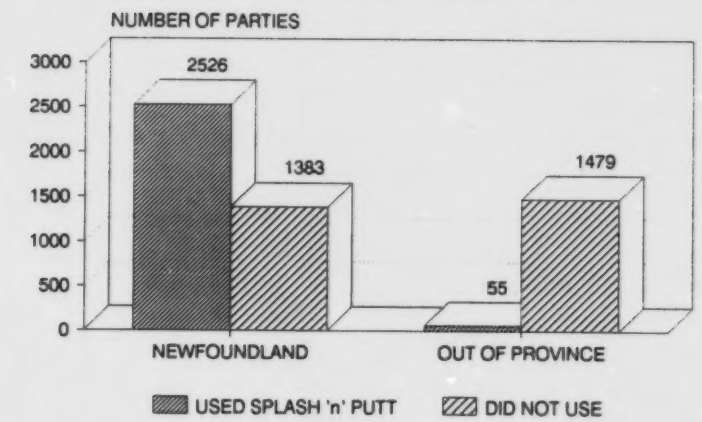
Splash 'n' Putt

Splash 'n' Putt is a privately owned amusement area located just outside the north boundary of the park. Activities include water slides and a mini putt.

- Almost half of all Newman Sound camper parties indicated they used Splash 'n' Putt.
- There is a definite relationship between use and origin. Only 4 per cent of the out-of-province camper parties went to Splash 'n' Putt. By comparison, 63 per cent of the Newfoundland camper parties staying at Newman Sound went to Splash 'n' Putt.
- One quarter of the campers using Splash 'n' Putt were first time visitors to the park.
- The number of individual Newman Sound campers who used Splash 'n' Putt was estimated from the survey to be approximately 10,150 (this does not account for repeat use of Splash 'n' Putt during the same stay and assumes all members of the party visited together).

Figure 13

USE OF SPLASH 'N' PUTT BY ORIGIN
NEWMAN SOUND CAMPERS



BASE = 5440 CAMPER PARTIES

Ochre Hill

- Almost one third of Newman Sound campers went to the Ochre Hill fire tower.
- There were 340 out of province camper parties who visited Ochre Hill compared with 1355 Newfoundland parties.
- Three quarters of the Ochre Hill visitors were repeat visitors to the park.
- Of the 1700 first time camper parties, 24 per cent indicated they visited Ochre Hill.

Blue Hill

- Blue Hill received fewer Newman Sound Campers than Ochre Hill. An estimated, 1,130 Newman Sound camper parties visited Blue Hill.
- As with Ochre Hill, most were from Newfoundland (75%) and most were repeat visitors (84%).
- Only 10 per cent of the first time camper parties visited Blue Hill.

Picnicking

- Almost 40 per cent of Newman Sound campers picnicked.
- Picnic facilities tend to be used more by tent campers and tent trailer campers. Approximately 45 per cent of tent trailer campers picnicked during their stay. By comparison, 32 per cent of motorhome campers and 29 per cent of trailer campers used the picnic facilities. This is likely because the trailer and motor-home units have kitchens and their users prefer the conveniences of home when camping.

Interpretation Programs

- Almost 40 per cent of the Newman Sound Camper Parties took part in one or more interpretive program while staying in the park.
- There were 460 out-of-province camper parties who indicated they took part in the interpretation programs compared to 1530 Newfoundland parties.
- Just under *one third* of the interpretation program users were in the park for the *first time*.

Fishing

- An estimated 9 per cent of the peak summer season Newman Sound campers went saltwater fishing on their trip to the park.
- Three quarters of these fishing parties were of Newfoundland origin.
- Approximately 9 per cent of the camper parties took part in freshwater fishing, 86 per cent being of Newfoundland origin.

(NOTE: the July and August period covered by this survey is not the peak fishing season)

Golf Course Use

- Of the 5440 parties who camped in Newman Sound, 590 used the Golf Course.
- Over 90 per cent of these golfers were from Newfoundland.
- All of the Newfoundland camper parties who golfed were repeat visitors and all of the out-of province golfers were first time visitors to the park.

Boat Tours

- An estimated 485 Newman Sound camper parties (app. 1450 individuals) took a boat tour while in the park during the peak camping season. This accounts for about 9 per cent of the total number of parties using the campground.
- Approximately 70 per cent of the boat tour participants were from Newfoundland.

Malady Head Day Use Area

Approximately 110 Newman Sound camper parties used the Malady Head Day Use Area during the 1989 peak summer season.

Funland

- Funland is another privately owned amusement facility located near the park, at Eastport.
- Funland received just over 680 camper parties from Newman Sound campground, or 13 per cent of the campers.
- Over 95 per cent were form Newfoundland. Fourteen per cent of the Funland visitors who stayed in Newman Sound were in the park for the first time.

5.2 PROFILE OF MALADY HEAD CAMPGROUND USERS

5.2.1 SEASONAL OCCUPANCY

On weekends during the 1989 summer season, Malady Head Campground experienced occupancy rates in excess of 50 per cent. The more typical situation however, is expressed in the seasonal average of 37 per cent as shown in Figure 14 and 15 below. Of the 10,230 site nights available during the 1989 peak season, 3,800 were occupied. Both July and August had the same occupancy rates.

FIGURE 14

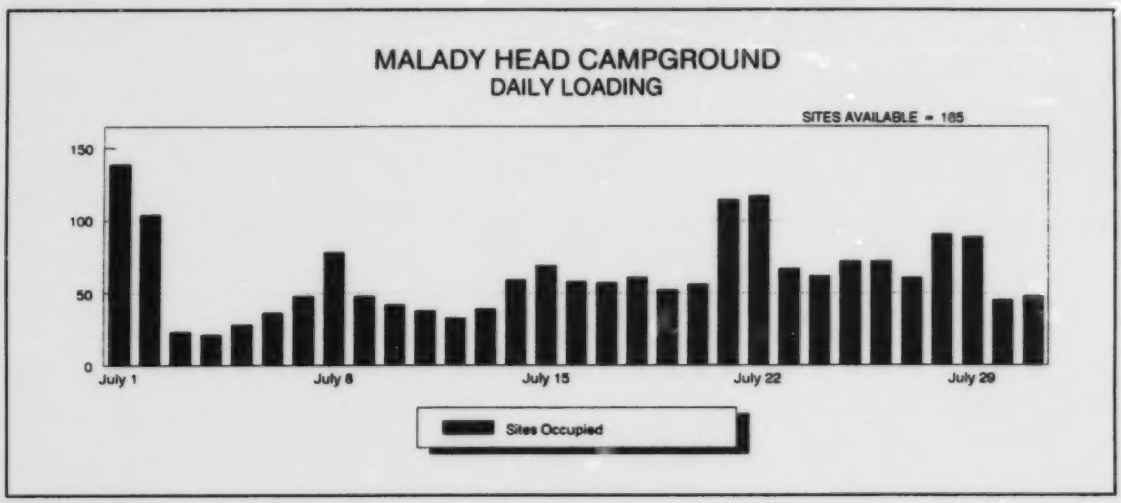
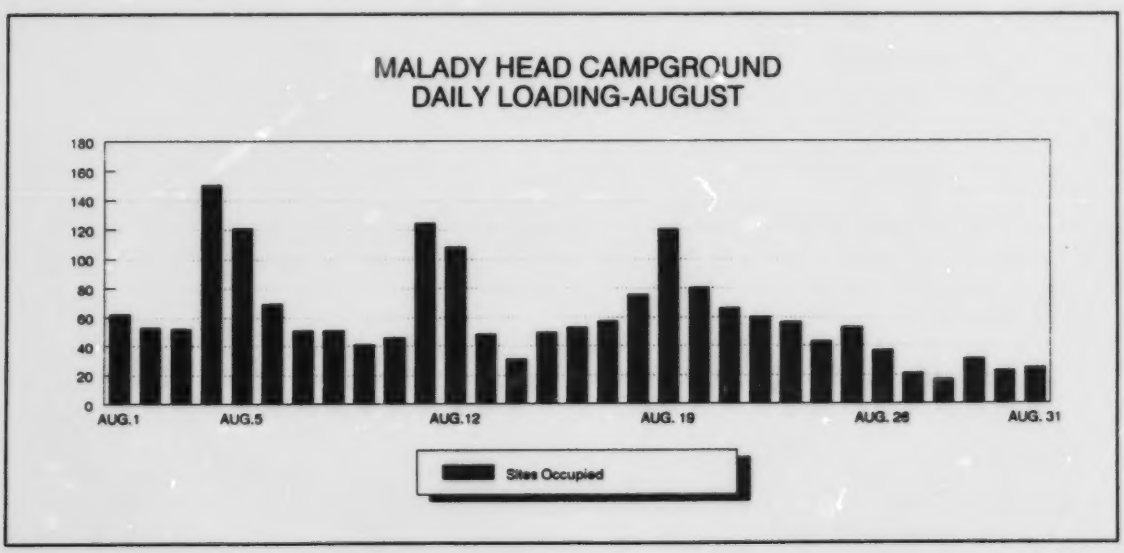


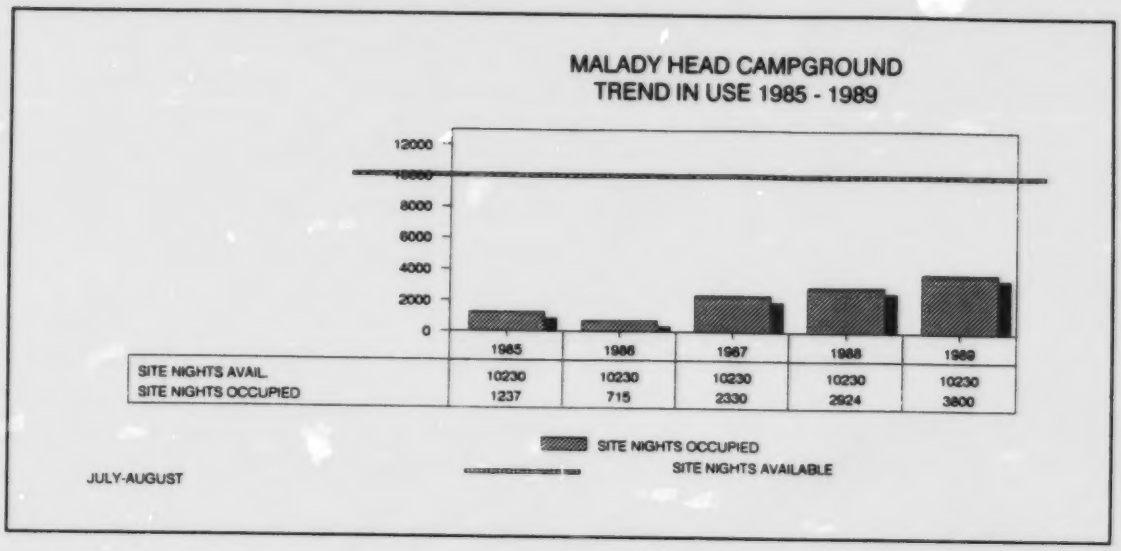
FIGURE 15



5.2.2 TREND IN USE

In 1986 Malady Head Campground reached an all time low of 7 per cent occupancy. Since then, use of the campground has increased considerably to the current level of occupancy of 37 per cent. While this recent increase follows the general camping trend in North America, other factors have to be considered as well. For example, the establishment of Splash 'n' Putt adjacent to the park is as a factor influencing this growth. The growth can also be attributed to the increased overflow at Newman Sound campground on peak season weekends.

FIGURE 16



5.2.3 ORIGIN

During the peak season there were 1845 camper parties who stayed at Malady Head Campground. Approximately 70 per cent of these campers were from Newfoundland, 20 per cent from other parts of Canada and the remaining 9 per cent were from United States.

5.2.4 REPEAT VISITATION

Just over half of all Malady Head camper parties were in Terra Nova National Park for the first time. Only one third of **Newfoundland** campers at Malady Head were in the park for the first time. Approximately 80 per cent of the other Canadian campers and 85 per cent of American campers were first time visitors to the park.

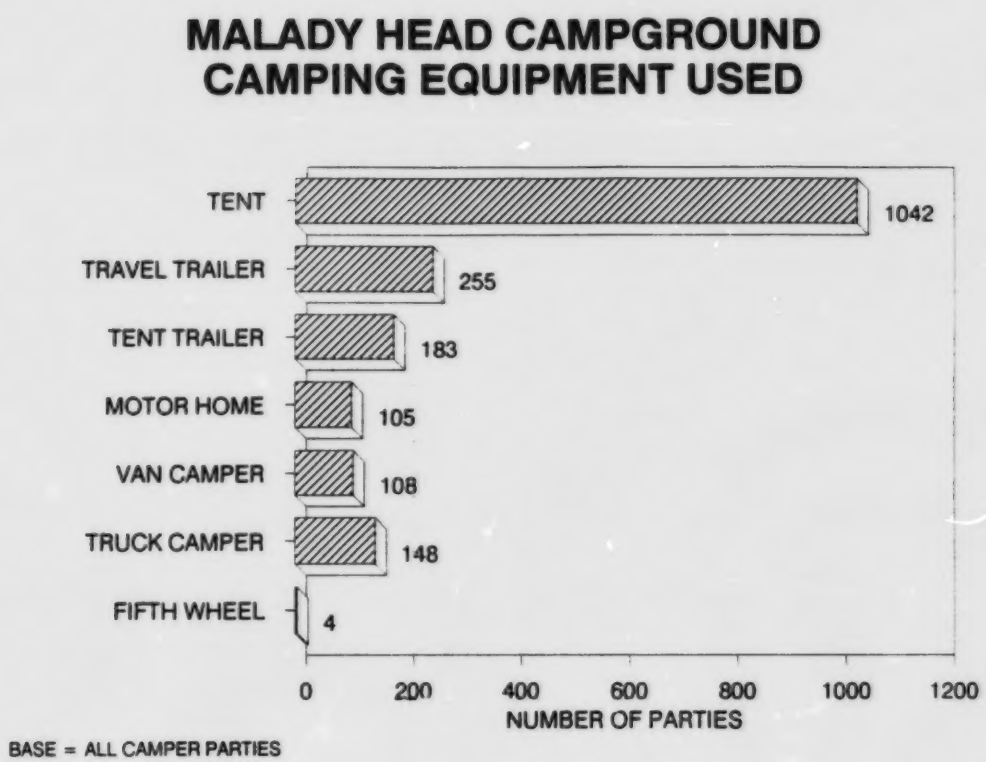
Of the 790 repeat camper parties, 195 camped in the park earlier during 1989 and 340 last camped in the park in 1988.Repeat campers were asked how many times they camped in Terra Nova over the previous five years. Almost one third of Malady's repeat campers camped in Terra Nova on three or more occasions over the previous five year period.

The mean length of stay was 2.06 nights.

5.2.5 Equipment Type

Approximately half of the Malady Head campers parties used tents (56%). The second largest category of equipment used was Travel Trailers at 14 percent, followed by Fold Down Trailers (10%), Truck and Van Campers (14%) and Motor Homes (6%).

Figure 17



5.2.6 Party Composition

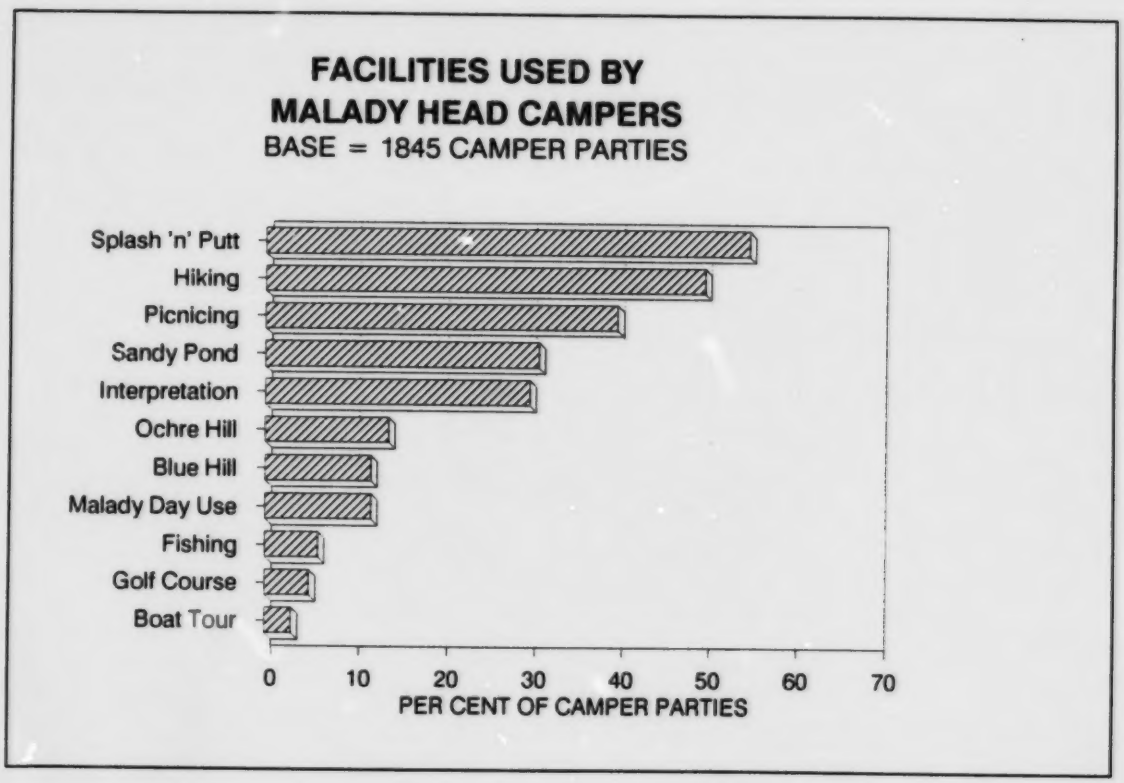
Almost half of the campers were couples. This is not typical of most national park campgrounds in Atlantic Region where families are the single largest group.

5.2.7 FACILITIES USED BY MALADY HEAD CAMPERS

Splash 'n' Putt

- Slightly more than one third of the Malady Head campers used the Splash and Putt facility located just outside the park's west boundary.
- Over 90 per cent of these campers were from Newfoundland with the balance being from other parts of Canada. No American campers used the facility.
- There was a strong relationship between use and group size. Only 12 per cent of the couples used the facility compared with over 60 per cent of the groups with four or more party members.
- Many of the Splash 'n' Putt users were first time visitors to the park (280 out of 630 parties). Most of these were first time visitors from Newfoundland.

FIGURE 18



Hiking

- Almost half the campers used the park's hiking trails.
- There was a noticeable difference by origin. Almost 70 per cent of American Campers hiked compared to 48 per cent of the Newfoundland campers and 44 per cent of other Canadian campers who used Malady Head campground.

- There is a strong positive correlation between length of stay and hiking. Motorhome campers tend to use the trails less than all other campers with only 30 per cent of this group indicating hiking as an activity.

Picnicking

- Almost 40 per cent of Malady Head campers indicated they used the park's picnic facilities.
- There is a direct linear relationship between the length of stay in the park and the use of picnic facilities. As the length of stay increases, so does the propensity to use picnic facilities.

Sandy Pond

- Slightly more than 30 per cent of Malady Head campers used Sandy Pond.
- The majority of these beach users were from Newfoundland (78%). Only 15 per cent of the Canadian campers and 7 per cent of the American campers used Sandy Pond.
- There is a strong positive correlation between use of Sandy Pond and length of stay.
- Two thirds of the Malady Head campers who swam at Sandy Pond were repeat visitors to the park.
- Over 60 per cent of fold down trailer users and 40 per cent of motorhome users swam at Sandy Pond. This compares to only 16 per cent of the fold down trailer users and 30 per cent of the tenters.

Interpretation Programs

- The interpretation programs were attended by 18 per cent of Malady Head camper parties. Since there was no measure of repeat attendance of interpretation programs, this number does not reflect the total use of the program.
- There was no relationship between length of stay and use of the programs.
- Approximately two thirds of the interpretation attendees were from Newfoundland, 24 per cent from other parts of Canada and 8 per cent from United States.
- 24 per cent of Newfoundland campers, 14 per cent of other Canadian campers and 10 per cent of American campers took part in the programs.

Ochre Hill

- An estimated 14 per cent (250) of Malady Head camper parties visited Ochre Hill. There was no significant difference by origin.

Blue Hill

- Just over 10 per cent (220) of Malady Head campers visited Blue Hill Fire Tower. Again there was no difference by origin.
- A larger percent of repeat visitors went to the tower (17%) than first time visitors (8%).

Malady Head Day Use Area

- Only 12 per cent (220 parties) of the Malady Head campers swam at Malady Head beach during the peak summer season.

Fishing

- 6 per cent of Malady Head campers took part in salt water fishing. Almost half were from Newfoundland.
- 3 per cent of the Malady Head campers took part in fresh water fishing. (Note: the peak fishing season in Terra Nova is in the spring, whereas this survey was conducted during July and August.)

Golf

- 5 per cent of Malady Head campers golfed at Twin Rivers. Almost 80 per cent were of Newfoundland origin.

Boat Tours

- Only 3 per cent of Malady Head campers took the boat tour. No further breakdown is possible due to this small size of this activity group.

CHAPTER 6.0 ASSESSMENT OF CURRENT PRODUCT OFFER

The present chapter examines the *performance of the campgrounds in terms of meeting camper's needs*. A market research technique known as performance-importance analysis was used to arrive at an understanding of how campers rated the facility and where improvements are necessary. The technique is described briefly below.

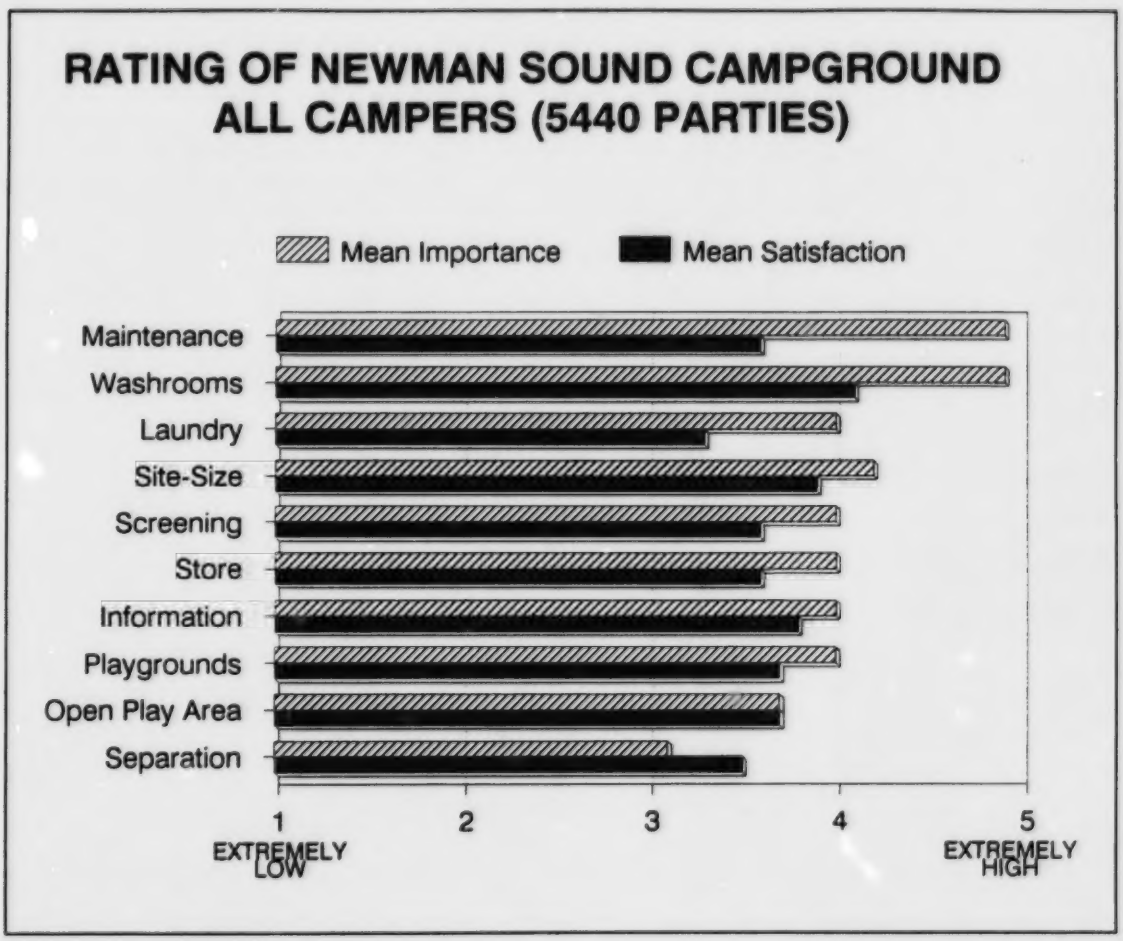
Campers were provided a list of attributes which might be available in a typical campground and asked to rate the importance of these attributes to their camping needs. A second attribute list containing products and services offered in Terra Nova's campgrounds was used to arrive at a satisfaction rating by campers. Campers circled values from 1 to 5 for each of the attributes, where 1 was extremely unimportant (or dissatisfied) and 5 was extremely important (or satisfied). In the graphic illustrations which follow, the mean scores for importance and satisfaction are shown. There are two important uses of these data. The first is to establish the *relative importance of each attribute* from the customer's point-of-view. Secondly, by comparing the mean scores for importance and satisfaction, campers indicated where improvements are necessary.

The difference between mean scores is significant. For example, a mean 'importance' score of 4.9 and a 'satisfaction' score of 3.9 indicates that the overall level of satisfaction is lower than it should be given the level of importance the camper has assigned to the attribute. Ideally, the two scores should be close. The underlying assumption in that when the camper rated importance and satisfaction for the attribute, that providing a higher score for importance than satisfaction indicates a deficiency exists.

6.1 NEWMAN SOUND CAMPGROUND

Figure 19 shows the importance of selected attributes for Newman Sound campground. These data relate to all campers who used the campground during the peak camping season. Campsite maintenance, washrooms and laundry facilities are the main problem areas according to the visitors.

Figure 19



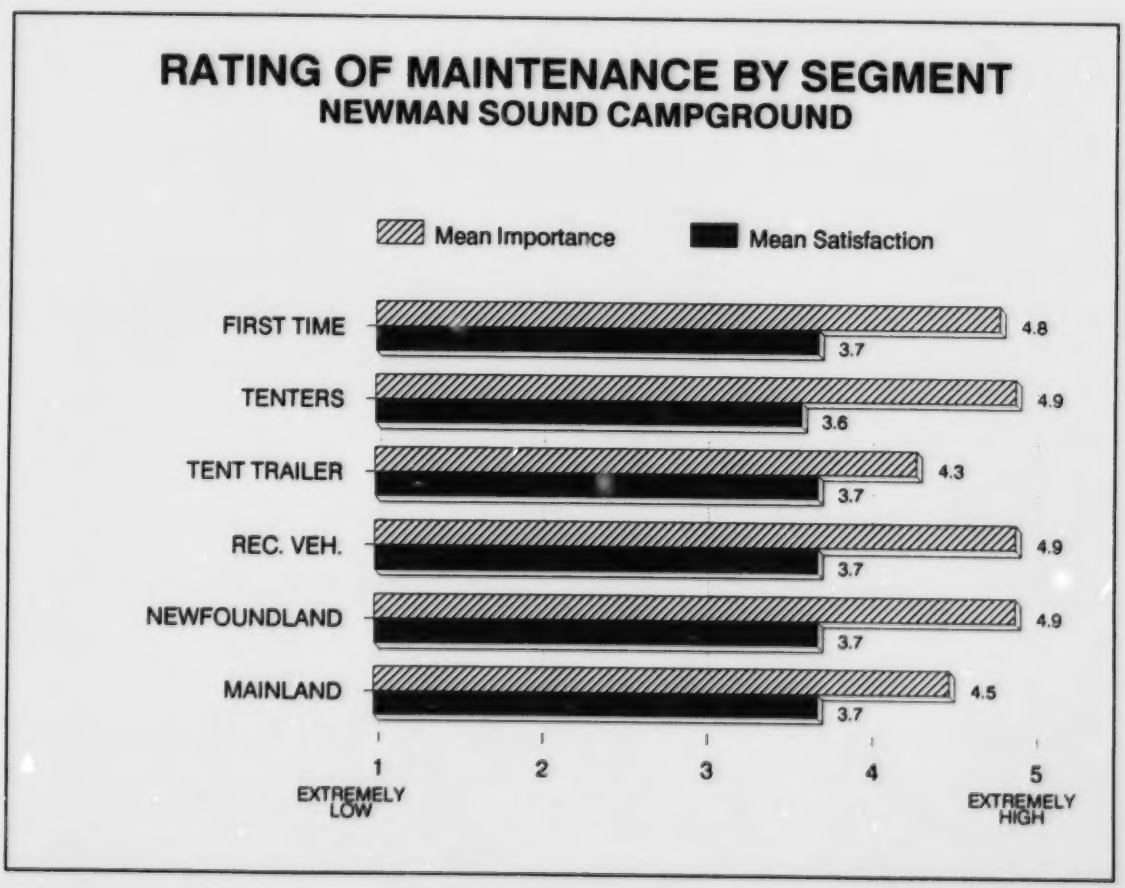
To expand on their responses, approximately one third of the campers provided extensive written comments. The comments were linked to camper survey data base allowing the comments to be segmented. The three most common complaints of campers related to site maintenance, washrooms and the lack of adequate laundry facilities. Each attribute is discussed below in terms of user segments which are known to influence campground use. **The camper's comments are listed in Appendix 'A'.**

6.1.1 MAINTENANCE

In every segment, maintenance came across as the number one problem. Camper's comments provided insight as to the specific nature of the problem. Virtually all maintenance related comments alluded to litter, beer caps and cigarette butts. Some campers also suggested that since the Canadian Parks Service is an Environment Canada program, a lead role should be adopted in terms of recycling of refuse and teaching environmental ethics. Furthermore, by comparison, Terra Nova's campgrounds were considered to be maintained to a poorer standard than Provincial Park campgrounds and other national park campgrounds in the Atlantic Provinces.

The problem is symptomatic of a very large campground with a dwindling operating budget and a badly deteriorated resource. Interestingly, campers were sympathetic towards the problem facing park management, blaming other campers and not park management, for the state of the campground. Regardless of the cause, the priority for improving site maintenance is such that immediate action is required. In redesigning the campground, the design should take into account the requirement for ongoing cleanup and recycling of refuse.

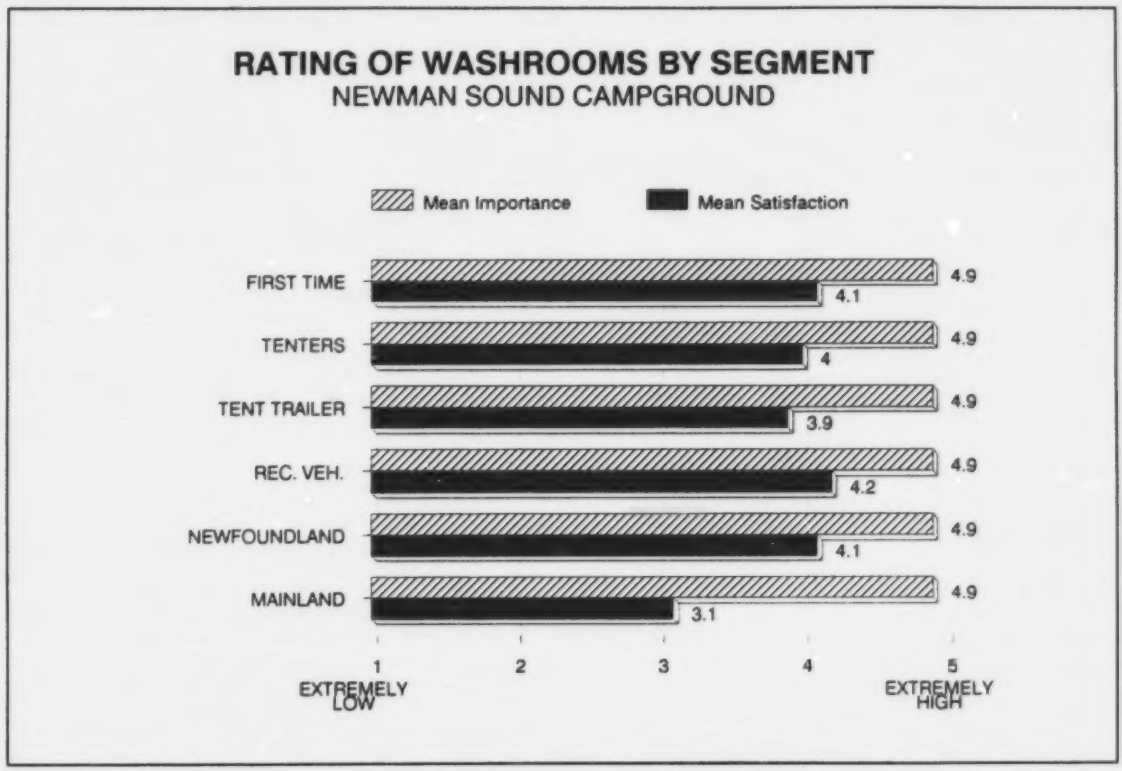
Figure 20



6.1.2 WASHROOMS

The importance of clean washrooms was extremely high by all segments with a mean value of 4.9. Satisfaction means ranged from a low of 3.1 for out-of-province campers to a high of 4.2 for R.V. users. In addition to cleanliness, some campers were concerned with accessibility to the washrooms. Having to cross through other camper's sites to gain access to the washroom was also cited. The largest single negative comment related to the shortage of showers. Other less frequent comments related to smoking in the washrooms and lack of towels and soap,

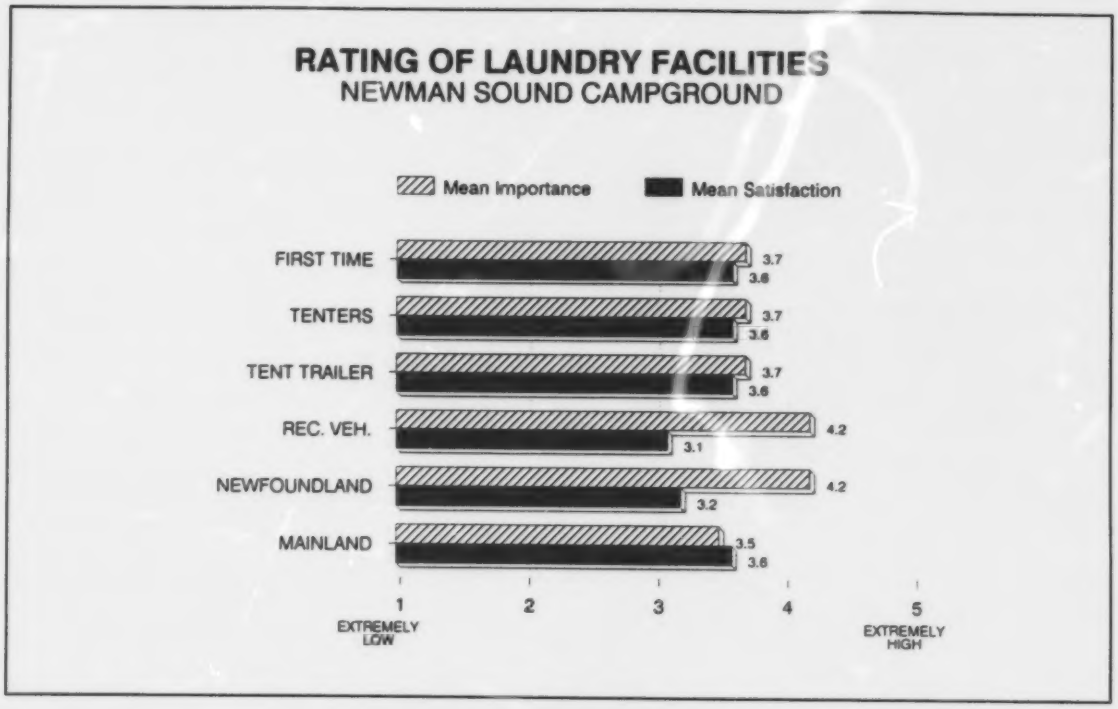
Figure 21



6.1.3 LAUNDRY FACILITIES

Laundry facilities were considered adequate by tent and tent trailer users, out of province campers and first time visitors. The reliance on laundry facilities by Newfoundland campers using RV's is evident from Figure 22. Insufficient laundry facilities were the subject of most comments. Although not illustrated in this graphic, the importance of laundry facilities is related to length of stay. RV users from Newfoundland record the longest stays in the park.

Figure 22

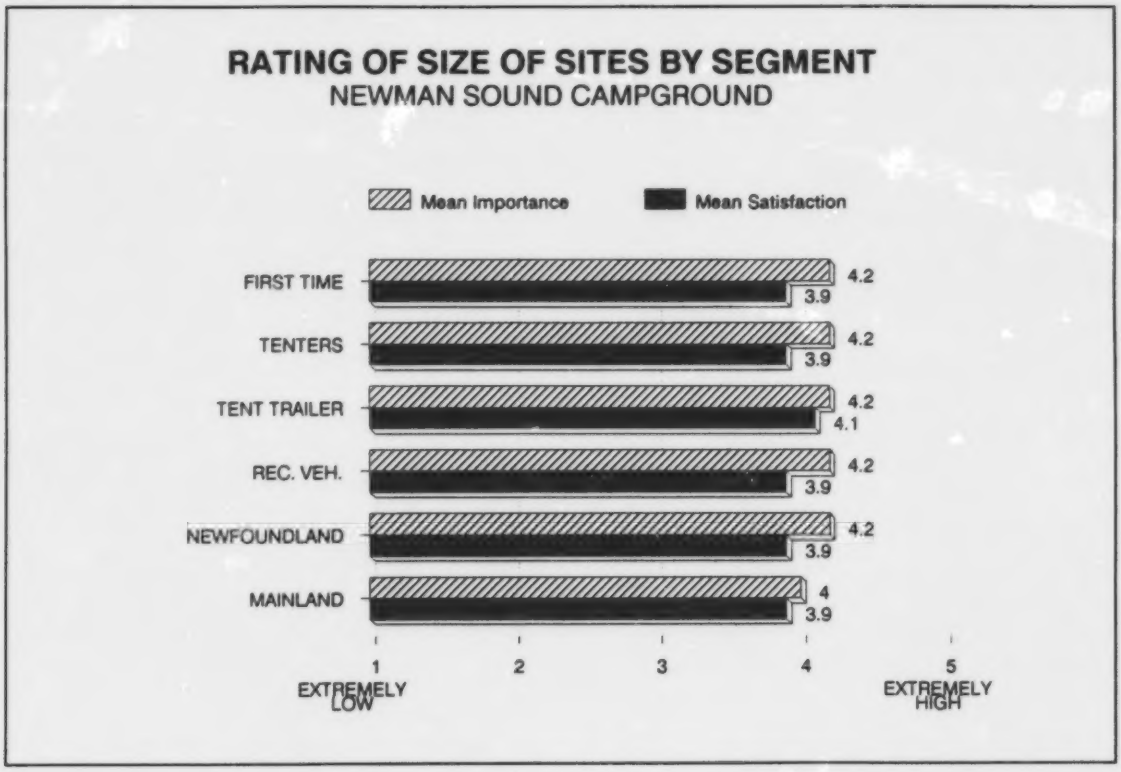


6.1.4 SIZE OF SITES

The results shown in Figure 23 are somewhat surprising. The difference between the mean scores in all segments do not indicate that the size of the sites is as serious problem as was originally believed. Nonetheless, the mean satisfaction is lower than the mean importance for every segment, which would indicate a need for improvement. There were relatively few comments concerning site size. Some campers indicated that the size of the sites was not a problem, rather the problem was with poor access to sites caused by the road layout.

Campers were asked if they had difficulty finding their sites. Less than 10 per cent of the parties had a problem locating their sites. Furthermore, few campers had a problem with the road surface. Over 80 per cent of the campers gave paving the roads low importance.

Figure 23



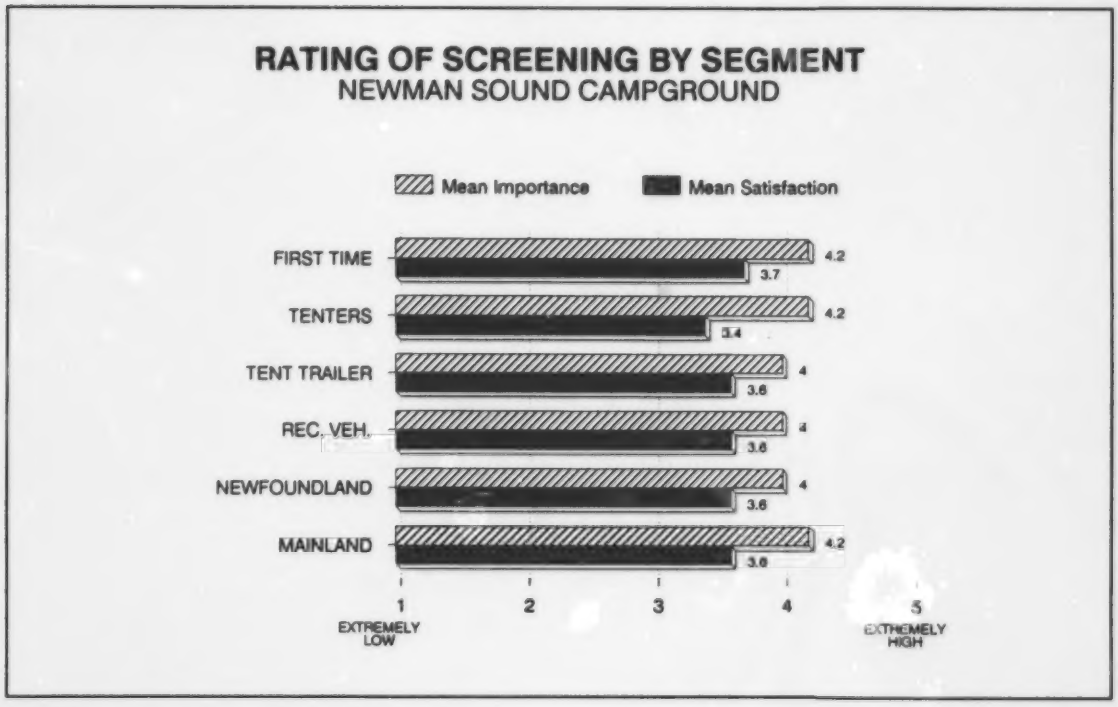
6.1.5 SCREENING

Natural screening between sites showed a very high importance rating for all segments. Satisfaction levels were considerably lower. **Tent users showed a particular interest in improved screening.**

Although improved screening would appear to be a priority for the majority of campers, **there remains a minority of campers who prefer open sites. Approximately 9 per cent of the parties (515) indicated screening was unimportant. Almost 90 per cent of these campers were Newfoundlanders using RV's and motor homes.**

The results of this question are contrary to popular belief, particularly with respect to Newfoundland campers who are often said to prefer open sites. It is probable that within the Newfoundland camping market, those who prefer open sites do not stay in national park campgrounds, as many alternatives exist.

Figure 24



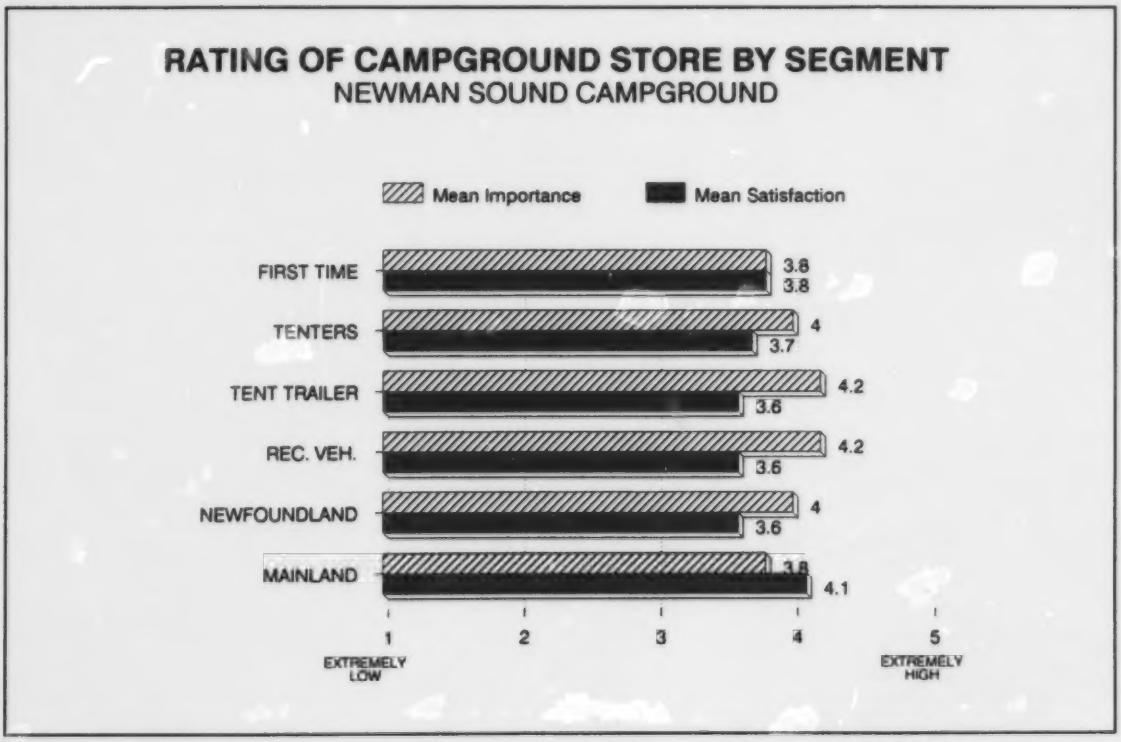
6.1.6 CAMPGROUND STORE

Out-of-province campers and first time campers rated their satisfaction with the campground store higher than importance. Therefore, according to these groups the store is performing up to or beyond their expectations.

The rating of the campground store resembles the rating of laundry facilities to some extent. Destination campers, place a high importance with the provision of the service. This group is also the most critical of the operation.

Next to maintenance of the campsites, the campground store generated the greatest number of negative comments, all of which were associated with prices being too high and poor selection.

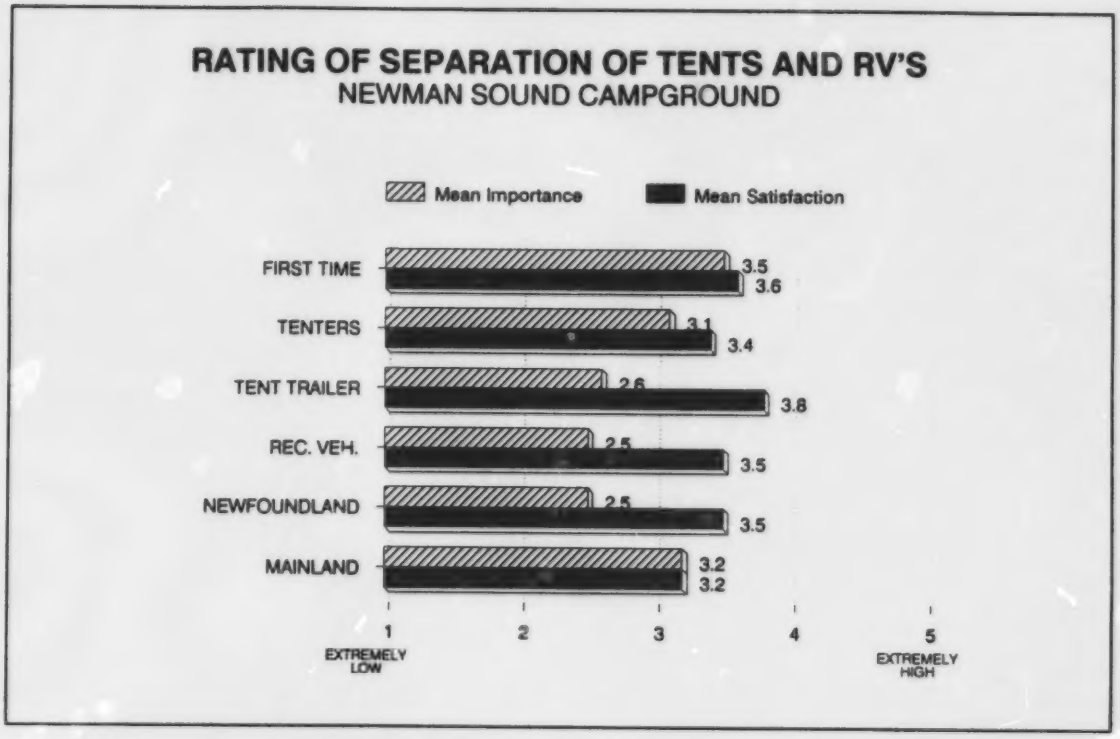
Figure 25



6.1.7 SEPARATION OF TENTS AND RECREATIONAL VEHICLES

Separation of tents and recreational vehicles was considered of low importance for the majority of campers. Even tent users who complained about the noise from generators did not see separation as being necessary.

Figure 26



6.1.8 PLAYGROUNDS AND OPEN PLAYING FIELDS

For main destination, family campers who stayed longer than two nights, playgrounds and open areas are very important. The satisfaction scores for this segment are considerably lower, which would indicate a need for improvement. The extended stay campers are primarily from Newfoundland and account for almost 30 per cent of all campers.

Figure 27

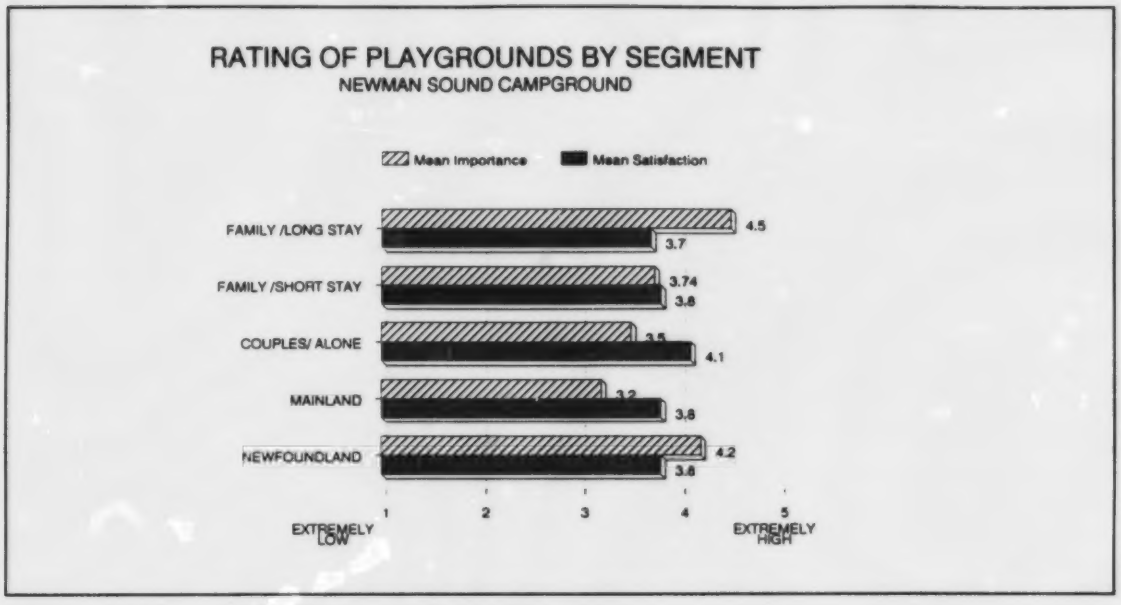
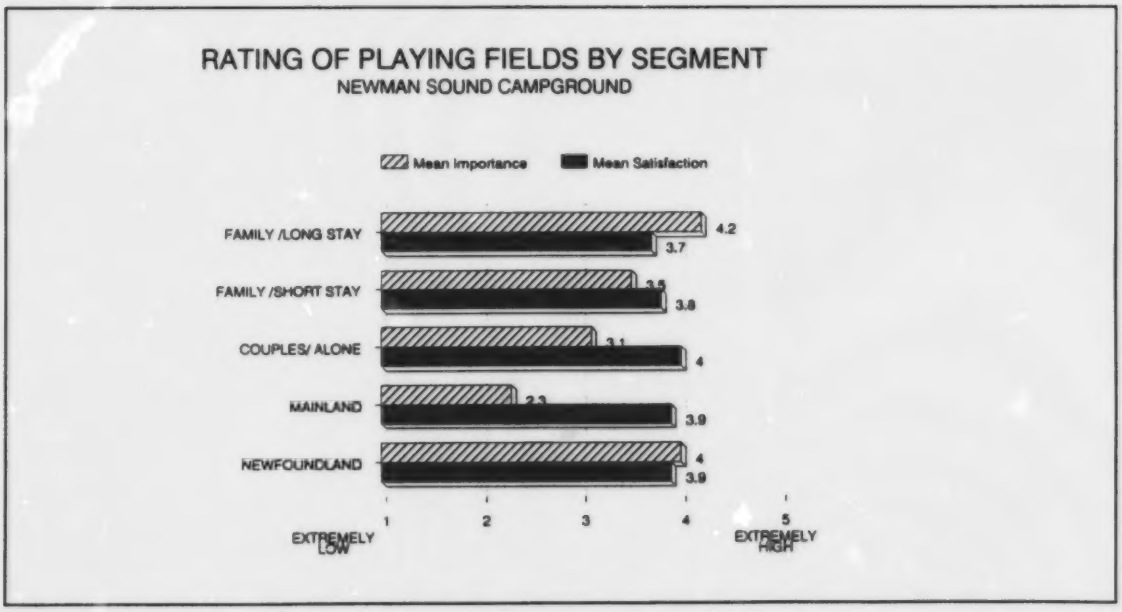


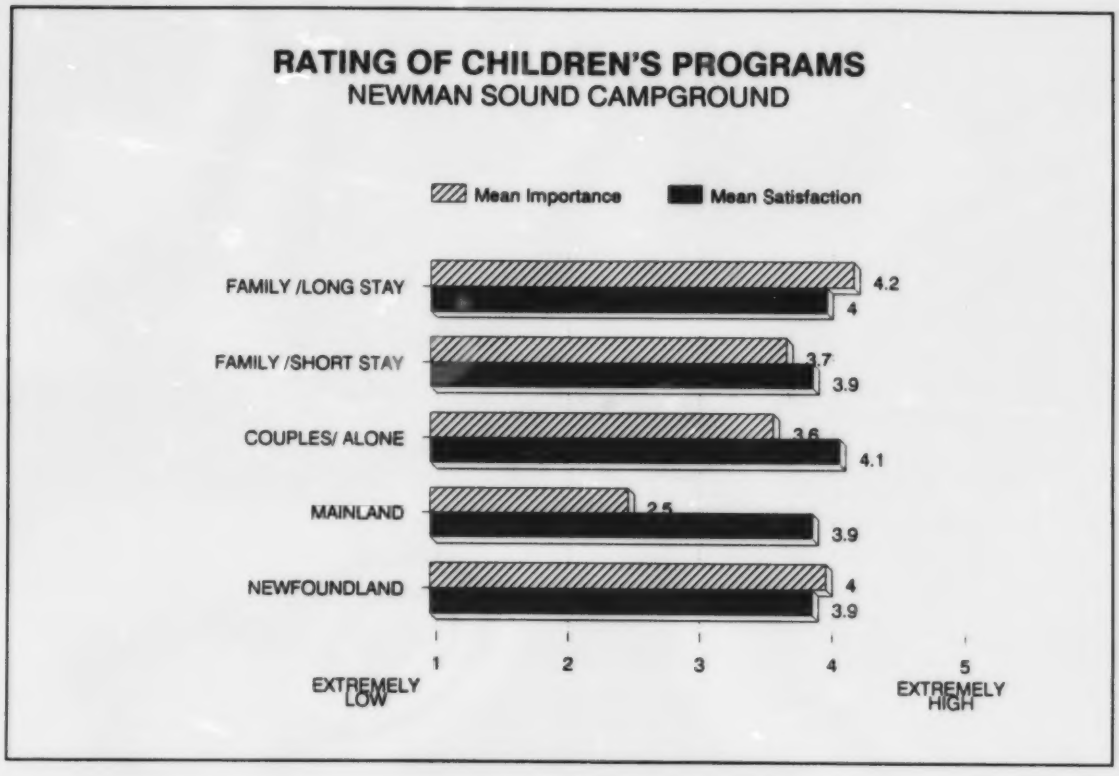
Figure 28



6.1.9 CHILDREN'S PROGRAMS

There would appear to be no serious problems with the children's programs offered at Newman Sound. Families staying in the park more than 2 nights indicated a slightly higher mean score for importance than satisfaction. Out-of-province campers would appear to be the most satisfied with the programs; however, this segment does not have a high number of campers travelling with children.

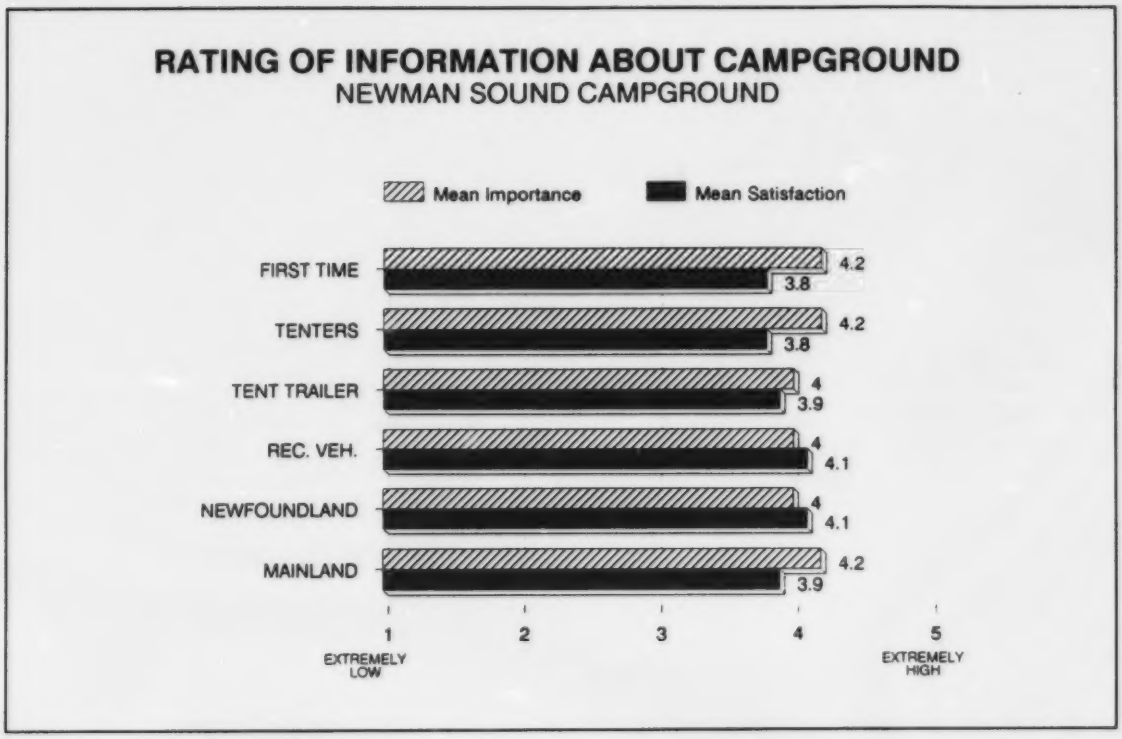
Figure 29



6.1.10 INFORMATION ABOUT CAMPGROUND

Out-of-province campers and first time campers indicated that there is a requirement for improved information about the park's campgrounds. For the majority of campers the information about the campground is adequate; however, this is likely due to the high repeat, regional use.

Figure 30



6.1.11 OTHER IMPROVEMENTS TO CURRENT PRODUCT

Approximately 1900 camper parties (36% of all parties) who indicated that other improvements were required to the existing services and facilities. The most prevalent among those were:

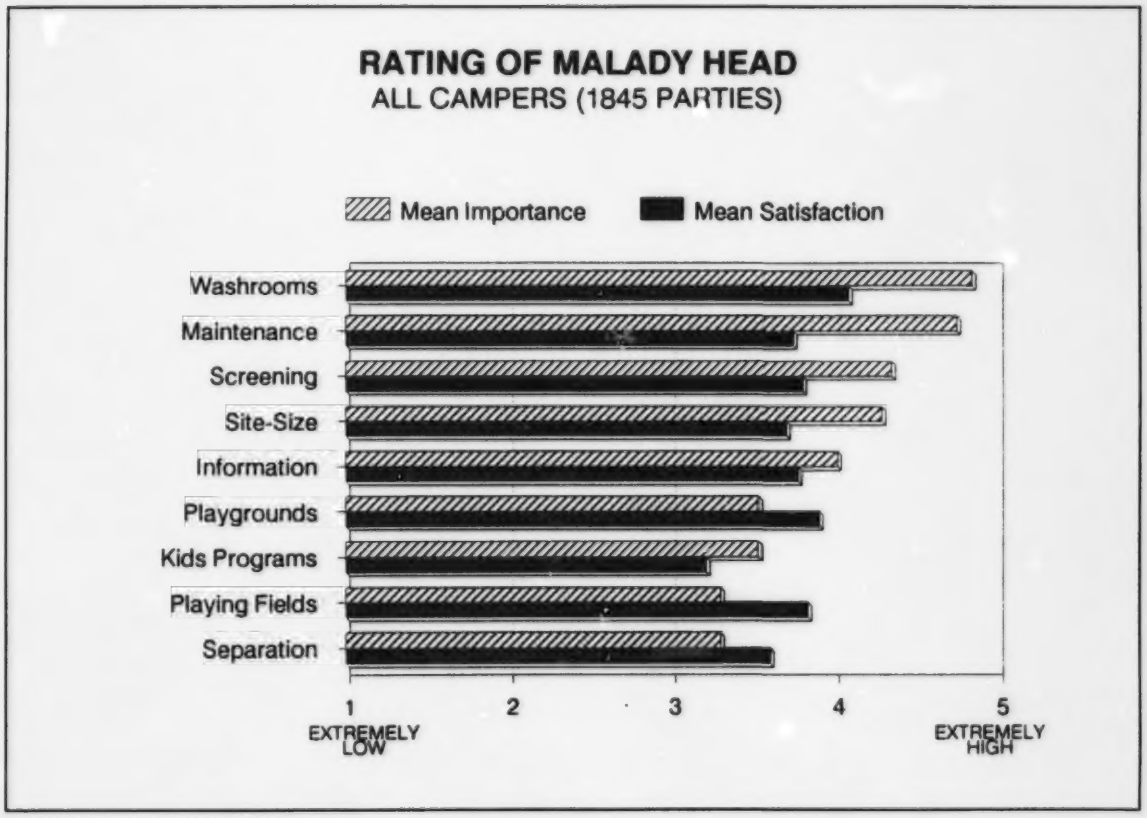
- better enforcement of quiet hours (n = 240, 13%)
- more showers and razor outlets (n = 230, 12%)
- grass tent pads instead of gravel (n = 135, 7%)
- more picnic tables and garbage cans (n = 100, 5.2%)
- eradication of wasps (n = 75, 4%)

6.2 MALADY HEAD CAMPGROUND

Figure 31 below illustrates the importance and satisfaction ratings given by Malady Head campers. Similar to Newman Sound, washrooms and site maintenance were given the highest importance and were shown to be in greatest need of attention. Size of sites, screening and separation of tents and recreational vehicles received similar ratings to Newman Sound, showing some need for improvement.

The principal concerns of campers, as expressed through their comments were, excessive litter, too much noise, insufficient washrooms and gravel tent pads.

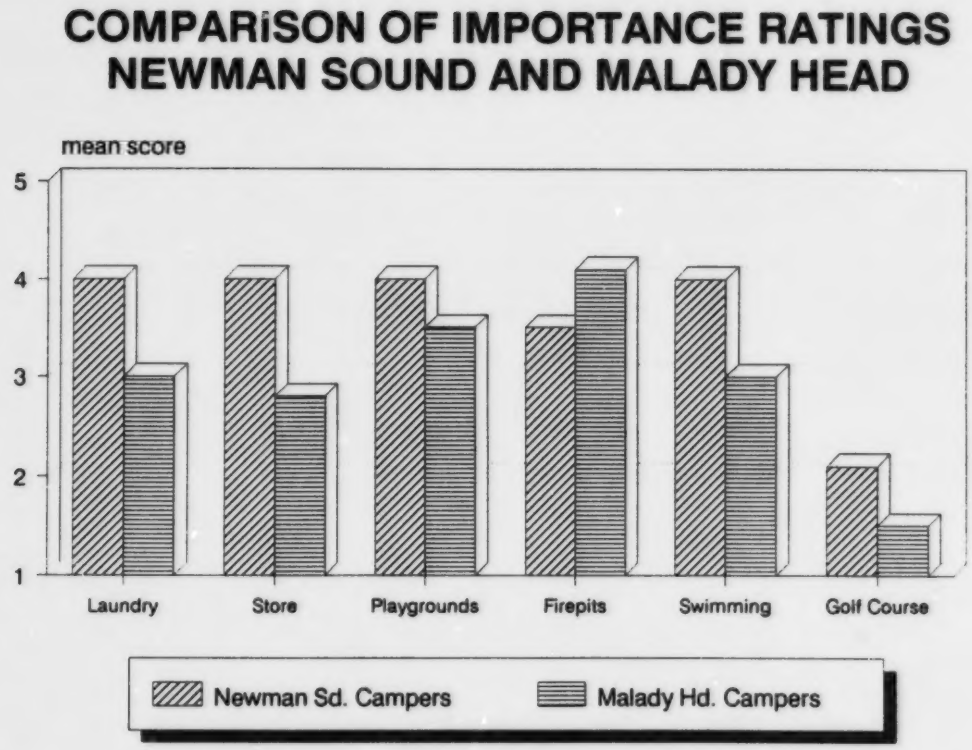
Figure 31



Perhaps more interesting than the similarities between Newman Sound campers and the those using Malady Head are the differences. **Figure 32 illustrates the attributes showing the greatest mean differences in importance.**

The mean importance of laundry facilities, a campground store, playgrounds and supervised swimming were rated higher in importance by Newman Sound campers than Malady Head campers. The presence of a golf course was very low in importance for both groups, but lowest for Malady Head. Firepits, however, showed a higher mean importance for Malady Head campers.

Figure 32



CHAPTER 7.0 ASSESSMENT OF POTENTIAL PRODUCT OFFER

Recapitalization is defined as replacement of the asset with its contemporary equivalent based upon current and projected market demand. As such, it was recognized that the current product offer may not meet the needs of today's camping market. The current chapter examines customer demand for services and facilities not currently offered at Newman Sound campground.

7.1 RECREATIONAL FACILITIES

Approximately one quarter (1400 parties) of the camper parties indicated that other recreational facilities should be available in the Newman Sound area. Over 80 per cent of those wanting additional recreational facilities were from Newfoundland. In order of magnitude these are:

●	swimming pool	540 parties
●	additional playgrounds and fields	275
●	tennis courts	220
●	fire pits	65
●	horse shoes	45

7.2 SERVICE HOOKUPS

Newman Sound campground offers only unserviced sites with centrally located service buildings. For the majority of the park's tenting population, the provision of central service buildings is considered adequate. However, for many of the users of travel trailers, tent trailers, motor homes etc., services are considered a necessary part of their camping vacation. For these campers, the cost of a serviced site is a marginal cost increase over an unserviced site relative to the amount of money they have invested in their equipment. Of the 5440 peak season camper parties at Newman Sound, approximately 2820 wanted and

were willing to pay premium rates for serviced sites.[4] **Of the 2500 camper parties, approximately 20 per cent wanted electrical hookups, 40 per cent wanted electric and water and 40 per cent wanted electric water and sewer hookups at their sites.**

The preference for serviced sites is significantly influenced by two factors;1) whether the campground is destination or stop-over en route; and, 2) the type of equipment used. Table One below illustrates the type of service preferred based on the type of equipment being used. Note the particular contrast in service requirements between tents/trailers and all other equipment.

TABLE ONE
EQUIPMENT TYPE BY LEVEL OF SERVICE PREFERRED
(number of peak season camper parties)

	unserviced	electric	electric/water	3-way
TENT	1510	162	225	0
TRAVEL TRAILER	360	99	283	384
TENT TRAILER	367	165	254	101
MOTOR HOME	64	64	169	291
VAN CAMPER	190	72	102	88
TRUCK CAMPER	185	156	89	62
FIFTH WHEEL	5	2	0	3
TOTAL	2681	720	1122	1055

Previous studies of national park campgrounds have shown that campers who used serviced sites stayed longer (de Lange, D., Horne, G. 1989; ADI Limited, 1988). Newman Sound campers were asked if the provision of serviced sites would influence their length of stay. Over 1000 camper parties (20%) indicated they would have stayed longer if they could have obtained a serviced site. Approximately 170 of these parties were out-of-province campers and for 280 parties it was their first time camping in the park.

Table Two illustrates the demand for campsites by hookup-type in terms of site nights of demand. The *frustrated demand* is based upon the additional number of nights campers in each category would have stayed had they obtained the services of their choice.

4 There is no doubt an overestimation of demand exists in a question of this nature since the consumer does not have to make a financial committment by stating their preferred level of service. None-the-less, the question does serve as a strong indicator of demand.

TABLE TWO
PEAK SEASON DEMAND FOR CAMPSITES
(CURRENT MARKET ONLY)
SITE NIGHTS

	unserviced	electrical	electric/water	3-way
current consumption	8918	1336	2934	3607
frustrated demand	0	429	1838	2915
total potential demand	8918	1765	4772	6522

An estimated 30 per cent increase in campsite demand could result if campers would obtain the serviced sites they desire. Since this estimate does not consider increased frequency of use or latent demand by those who avoid the park due to the lack of services, this estimate must be viewed as conservative.

Figures 33 and 34 illustrate the potential impact of demand for sites at Newman Sound during July and August should serviced sites be added.

FIGURE 33

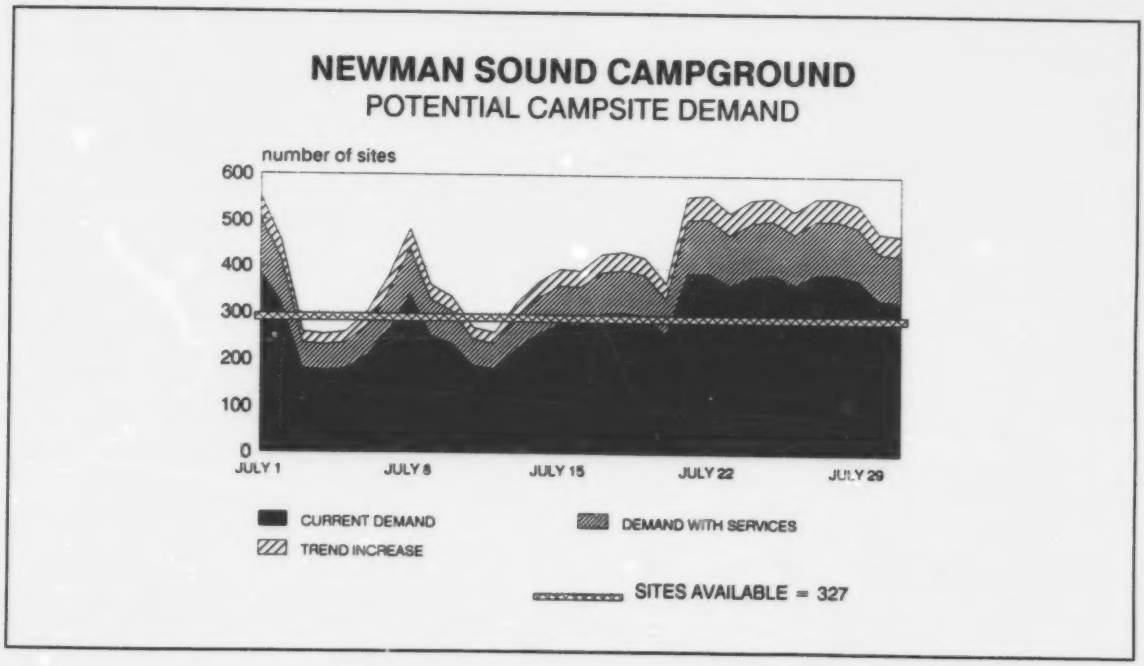
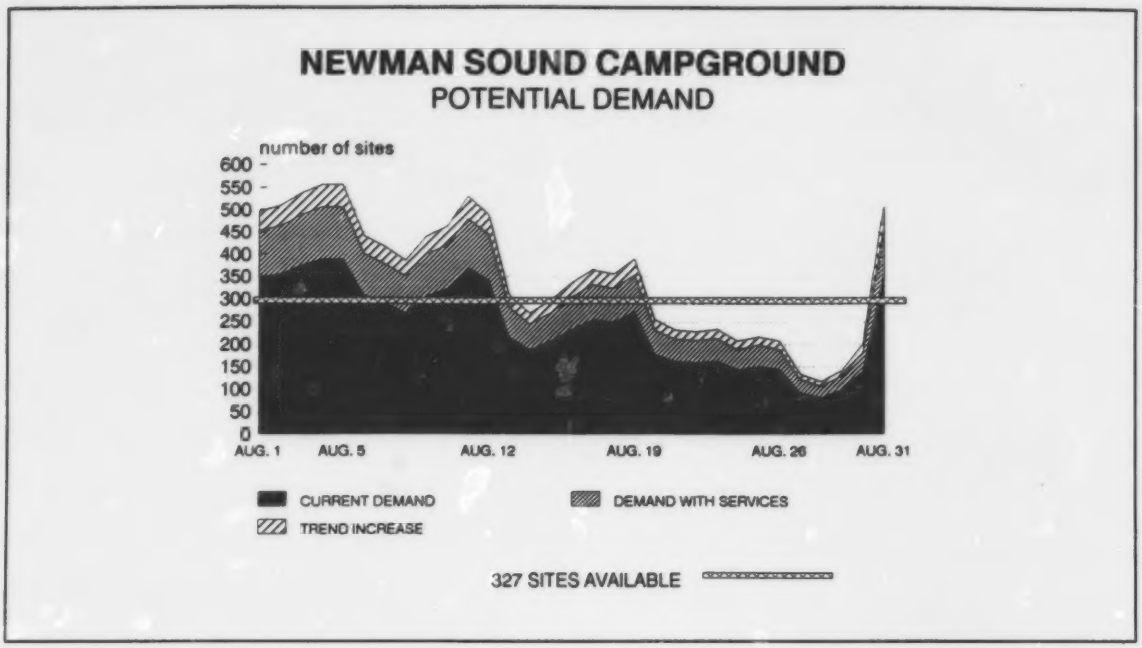


FIGURE 34



7.3 IMPACT OF CAMPING TRENDS ON USE OF NEWMAN SOUND

A comprehensive forecast of camping demand was prepared for the Canadian Parks Service, Atlantic Region by ADI Limited (1989). The forecast was based on demographic characteristics, consumer purchases of camping equipment, changes in leisure behaviour and a number of other variables. The results were further supported by an extensive literature review. The forecast as applied to Fundy National Park showed a potential growth in the camping market of 15 per cent over the next 20 years. For the purposes of the current study, this forecast was modified to account for the smaller regional camping market and access barriers to more distant markets. An accumulated increase of ten per cent over the next 15 years was used for the forecasted growth in demand for camping. In light of the recent surges in camping this may appear too conservative. However, the rapidly changing economic climate and prospects of an economic slow down or recession necessitate a conservative forecast. An apparent relationship exists between the economy and camping as shown in Camping Trends In Atlantic Region (Melanson, G.; de Lange D., 1989).

CHAPTER 8.0 MARKET POSITION

8.1 MARKET SEGMENTATION

The first step in determining the most desireable market position for the park's campgrounds is segmenting the camping market into a number of distinct groups. Factor analysis was used to segment the current camping market. These groups were confirmed by park management to ensure they reflect the park's existing camping market. Four categories emerged, as follows:

Destination Campers

Predominantly Newfoundland origin and families with children. Playgrounds and open playing fields rate high in importance. A supervised sandy beach is important but other park activities are less important (eg. trails, interpretation programs etc.). They tend towards a lengthy stay and rely on amenities such as laundry facilities and a campground store. For those with RV's serviced sites are preferred.

Luxury Campers

Use of R.V. equipment, require three way hookups, short stay and take part in sightseeing activities on foot or by vehicle. Have a preference for paved roads in campground. Prefer open sites. Would stay longer if services were available.

Traditional Campers

Predominantly tent and tent trailer campers who prefer well-screened, spacious sites, pleasant scenery and fireplaces. Do not require laundry facilities, campground store or hookups. There is a tendency for this group to be of non-Newfoundland origin.

Heavy Facility Users

Primarily tent and tent trailer users who stay a short time, use interpretive programs, trails, VRC and generally make use of the park's programs during their brief stay. There is no association with origin or repeat visitation.

There was no noticeable difference between the two campgrounds in terms of the above segments.

It is apparent that the park's campgrounds are a reasonable match for *traditional campers* and *facility users*. The importance of serviced sites to the *destination market* and the *luxury market* would indicate that this market is not well matched to the campgrounds as they exist. The fact that the latter two segments *presently use the campground* and tend to be dissatisfied would indicate that these segments should not be ignored.

8.2 POSITIONING THE CAMPGROUNDS

In private industry the market position is established on the basis of targeting the most profitable segments. Such is not the case with a public agency such as the Canadian Parks Service. There are many factors which influence the market position including, resource protection, equitable provision of educational and recreational opportunities and fostering of economic benefits. The mandate of the Canadian Parks Service does not exclude the provision of serviced sites in campgrounds (with the appropriate zoning designation). However, as a public agency the park must ensure that altering its market position does not compete with private operations. From an economic perspective, there is also no benefit to competing with other national parks or public parks offering camping.

By limiting the number of campsites to 330 at Newman Sound, Terra Nova National Park effectively reduces its competitive position. With 330 sites in Newman Sound, the park cannot meet the demand from its existing client base. A surplus demand will be generated which could be absorbed by other camping operations or Malady Head Campground. **It is not the intent of the CPS to draw campers from other parks, rather Terra Nova will enhance its product to meet the needs of its current market.**

The market position adopted by the park must consider future needs since the life expectancy of a campground is about 25 years. Trends in private campground operations in the United States show a transition from unserviced to serviced sites and many small operations to fewer, large operations. As stated earlier 75 per cent of the growth expected in camping is in the RV sector (ADI Limited, 1988).

Even with the provision of serviced sites, Terra Nova National Park can position itself uniquely amongst the camping market. The only campground offering serviced sites with a similar product offer is Grand Codroy Provincial Park in Western Newfoundland (50 sites). There are just over 60 campgrounds in Newfoundland, two thirds of which are owned and operated by the provincial government. Within three hour's drive of Terra Nova National Park there are there are 14 provincial parks and 7 privately owned operations. Most of the these parks are in the Avalon Region of the province and serve the nearby St John's market.

Gros Morne National Park is complimentary, not competitive, since it is located about one day's driving time from Terra Nova. In fact, for the touring market, all of the camping parks on the west coast are complementary.

Figure 35 shows the market position of the province's parks based upon the product and service offer. The position map was compiled by locating each of the provinces campgrounds along the two dimensional grid in accordance with the level of service offered at the campsites and the nature of the leisure opportunities available. Campgrounds offering more than one level of service were positioned separately according to the same criteria.

Product Cluster A, B, and C:

Of the 17 privately operated parks in Newfoundland, 15 offer serviced sites. Also characteristic of many of the commercial campgrounds are swimming opportunities (beach and/or pool), mini-putts, boat rentals and games areas. Some of the campgrounds (group A) are large ventures offering more than 100 sites (eg Pippy Park 132 full service sites 24 tent sites).

Product Cluster D:

Most of the campgrounds in this group are small municipal campgrounds (eg. Botwood 37 sites, Woolfey's Pond 22 sites) established to serve local recreational needs. They do not offer the range of activities available at commercial parks.

Product Cluster E, F and G:

These groups include a range of provincial parks. Cluster G, the largest segment, offer unserviced sites with a strong nature orientation. Cluster F is the anomaly in the provincial system - Grand Codroy, offering a mix of fully serviced and partially serviced sites.

Product Cluster H, I and J

Clusters H and I represent the campgrounds in the province's two national parks. **Group J illustrates the new market position possible for Terra Nova National Park with the provision of services.** There are 41 parks in clusters E, G, H and I and only one park in F. Given the demand for serviced sites with a strong nature/outdoor orientation, the current product-market match is not appropriate.

Figure 35

CHAPTER 9 OPTIONS ANALYSIS

Several options exist in terms of recapitalizing Newman Sound Campground. The options were based upon 3 criteria:

- providing a product sensitive to the market's needs
- environmental protection and rehabilitation
- cost effectiveness and investment criteria
- retaining a market position which does not increase the park's competitive position

In 1980 Newman Sound Campground was the subject of a comprehensive rehabilitation study (Gribbin, T., 1980). The study was prompted by a serious deterioration in the environmental quality of the campground. As stated in the report "after twenty years of intensive use, Newman Sound campground is showing considerable decline in environmental quality which, if left unattended, could possibly leave the campground in an open, barely vegetated state".

In addition to the environmental problems, the campground's infrastructure faces numerous structural deficiencies. The campground was constructed between 1960 and 1964. The expected life cycle for a campground is about 25 years. Engineering assessments have concluded that Newman Sound campground is in urgent need of recapitalization. The need for recapitalization was supported by Regional Senior Management in a review of the operation in 1986.

Two options have been developed, based upon the issues raised in the management review, and the user requirements presented in earlier chapters of this study.

9.1 OPTION 'A'

Option A is the recapitalization of the campground without increasing the service offer to the campers. Once implemented, the environmental problems will be alleviated and many of the camper's requirements will be fulfilled. The one aspect of visitor demand not met by this option would be service hookups. All of the work in this option is considered essential to return the campground to acceptable Canadian Parks Service Standards. Due to the extent of the work required it would be necessary to phase the work over 5 years.

The specific work to be carried out under Option A was based on the following:

The Maintenance Problem

The single biggest problem identified by campers was with respect to maintenance. Campers indicated excessive litter was the particular problem. However, the litter problem is accentuated by the deteriorated environment. Tom Gribbin, a Canadian Parks Service Landscape Architect has observed that gravel spreading through the vegetation, poorly

defined camping areas, scrub brush and other unsightly factors all create a perception that the campsites are worse than they really are. This does not to suggest however, that better site cleaning is not required. It is clear that additional resources are required for site cleaning. The environmental rehabilitation program accounts for almost one half of the total costs in this option.

PHOTO ONE

Photo Tom Gribbin

Photo one: typical campsite experiencing extensive gravel spread in Newman Sound.

PHOTO TWO

Photo Tom Gribbin

Photo two: environmental impact caused by a lack of designated walking trails.

Washrooms

Washrooms were also considered by the visitors to be inadequate in many parts of the campground. The recapitalization will provide additional showers, upgrade wiring, provide tile flooring and improve the general appearance and structural integrity of the buildings. Disposal fields are also required to service many of the existing washrooms.

Laundry Facilities

Concerns regarding the laundry facilities and the campground store fall outside the recapitalization program since they are operated under a concession agreement.

Site Screening

Screening between sites was cited as a problem by some segments of the camping market (eg. tent users). It is believed that camper's concerns regarding noise may also be relieved to some extent by providing better screening. Vegetative screening will be improved as part of the environmental rehabilitation.

Playgrounds

For destination campers with children, playgrounds are almost essential. Campers within this segment indicated that the existing playgrounds need to be upgraded. Playgrounds will be upgraded.

Circulation

Improved pedestrian and vehicular circulation is required. In a number of areas campers access washrooms by crossing other camper's sites or by making their own trails. Better defined pedestrian access is part of the rehabilitation plan. Traffic circulation problems include sites backing into intersections, poor directional signs and a confusing road layout which would be a serious threat in a fire situation. In addition, the gravel surface on the main roads is spreading into the surrounding vegetation. The road surface must be replaced with a chipseal, which is supported by a favorable Life Cycle Cost Analysis compared to pavement or gravel.

Size of Sites

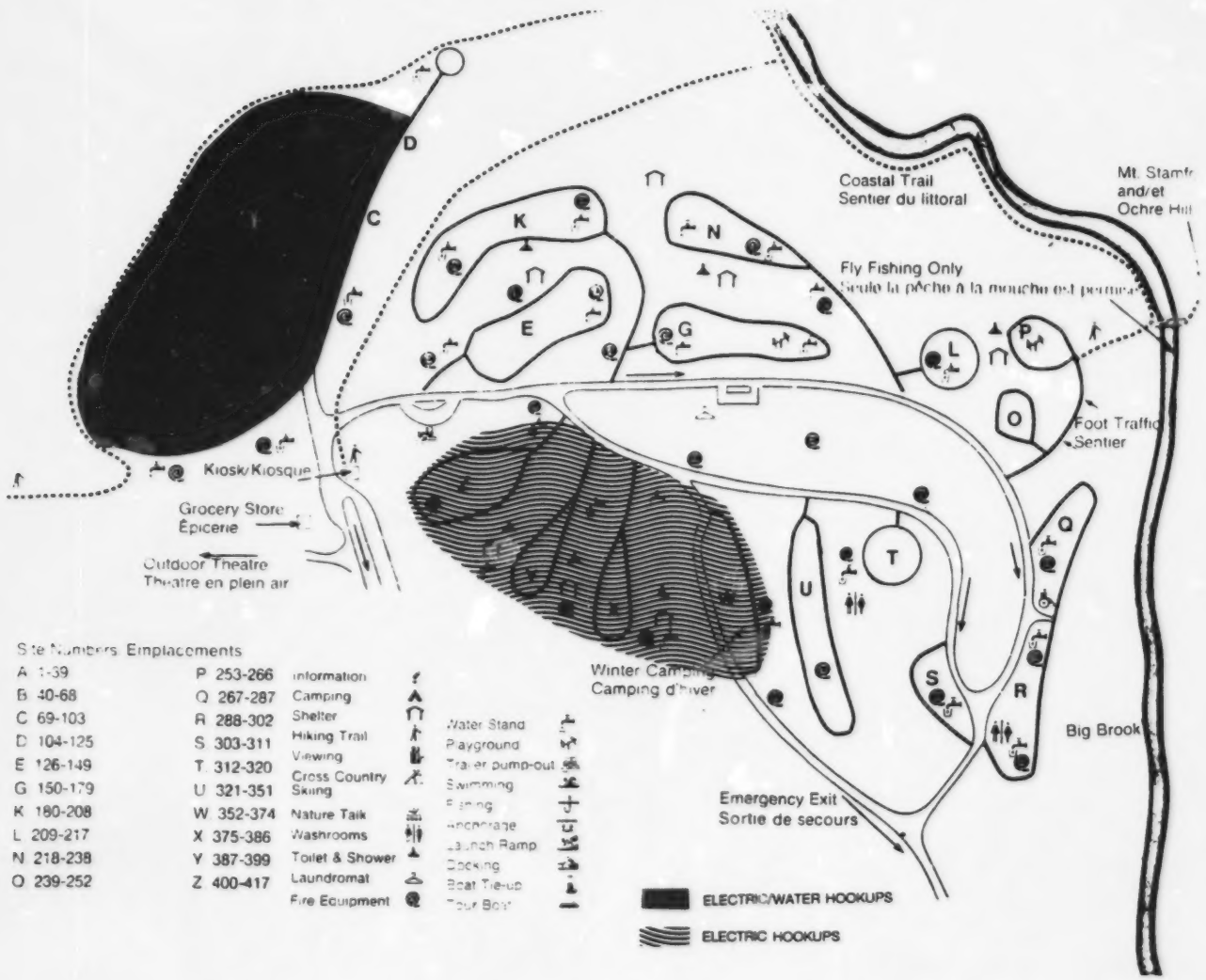
Provision of larger sites and the removal of severely impacted sites will have a significant impact on occupancy and satisfied demand. There is a requirement to remove about 30 sites for environmental reasons. Based upon the Rehabilitation Plan, increasing the size of the sites will result in about 30 additional sites being taken out of service for a total reduction of 60 sites. During July and August, 1989, Newman Sound recorded 16,814 site nights of use. This compares with a total available supply of 23,994 site nights (387 sites x 62 nights). The resulting occupancy rate was 70 per cent for the peak season. This peak season figure does not, however, reflect the peak weekend loading or the peak vacation period of late July and early August, when the campground runs at or near 100 per cent occupancy. Reducing available supply will result in surplus demand for campsites at Newman Sound throughout most of the peak season. This will create an overflow situation which will significantly impact the use of Malady Head Campground. This situation is discussed further in 9.3.

Other engineering requirements will be met through the provision of a new disposal field for the current dump station, provision of a second dump station, installation of gate valves on existing water lines and provision of fire hose cabinets.

9.2 OPTION B

Option B differs from Option A in that it provides electric services at 40 sites and water and electric services at 130 sites. The location of these serviced sites takes advantage of the existing water and power infrastructure to reduce the capital costs. The option approximates the serviced site preferences stated by campers by replacing fully serviced sites with electric and water hookups and improved central sewage dumping facilities.

Figure 36 SERVICED SITES - PROPOSED LOCATIONS



A third option initially considered, providing 3 way hookups, was deleted due to the high capital cost relative to the marginal increase in revenues. The cost of this option was estimated to be 3 times the cost of Option A and provided marginal increases in revenues over Option B. Furthermore, this option was considered O&M intensive.

9.3 FUTURE INVESTIGATIONS AND MONITORING

The reduction of campsites at Newman Sound coupled with the improved product will result in surplus demand for campsites. The camper survey determined that up to 65 per cent of the daily surplus could be satisfied by Malady Head Campground. There remains a considerable volume of surplus demand as a result of those who are not willing to go to Malady Head and on those peak days when Malady Head is full (see Figure 37). There are a number of options for dealing with the surplus, including provision of overflow camping at either campground, adding another loop to Newman Sound, adding another loop at Malady Head or leaving the surplus demand unsatisfied. The short duration of the surplus demand would likely make the provision of a third campground, private or public, a poor investment.

It was considered premature to consider any of these options in this analysis. Park management will be in a better position to predict the requirement for additional campsites once the recapitalization of Newman Sound has been completed.

FIGURE 37

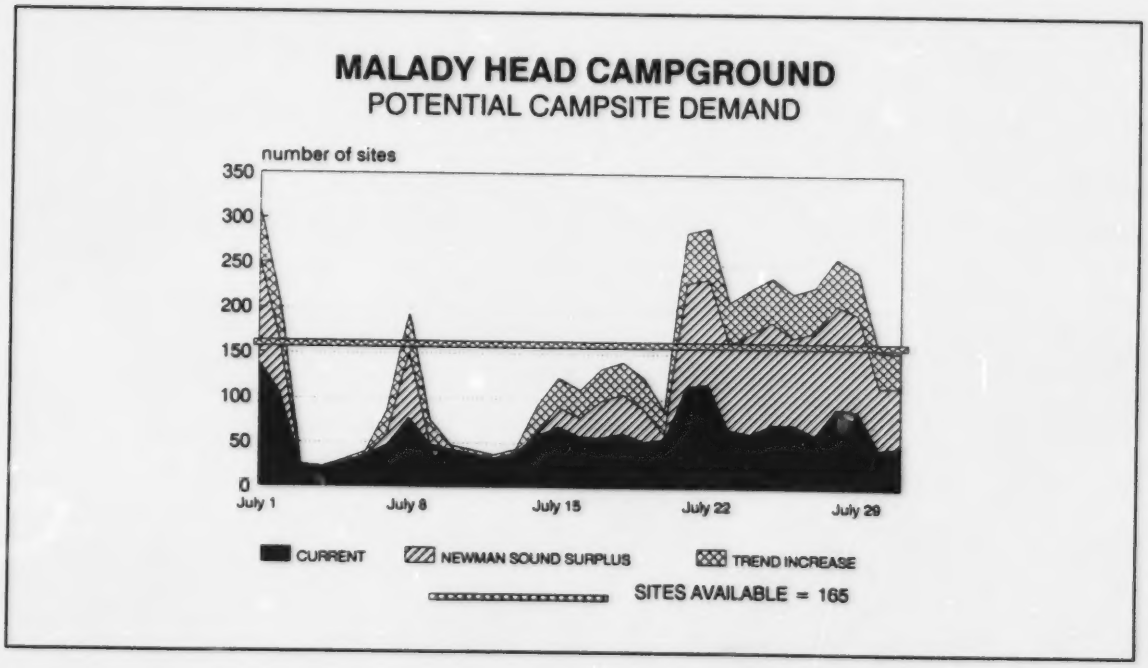
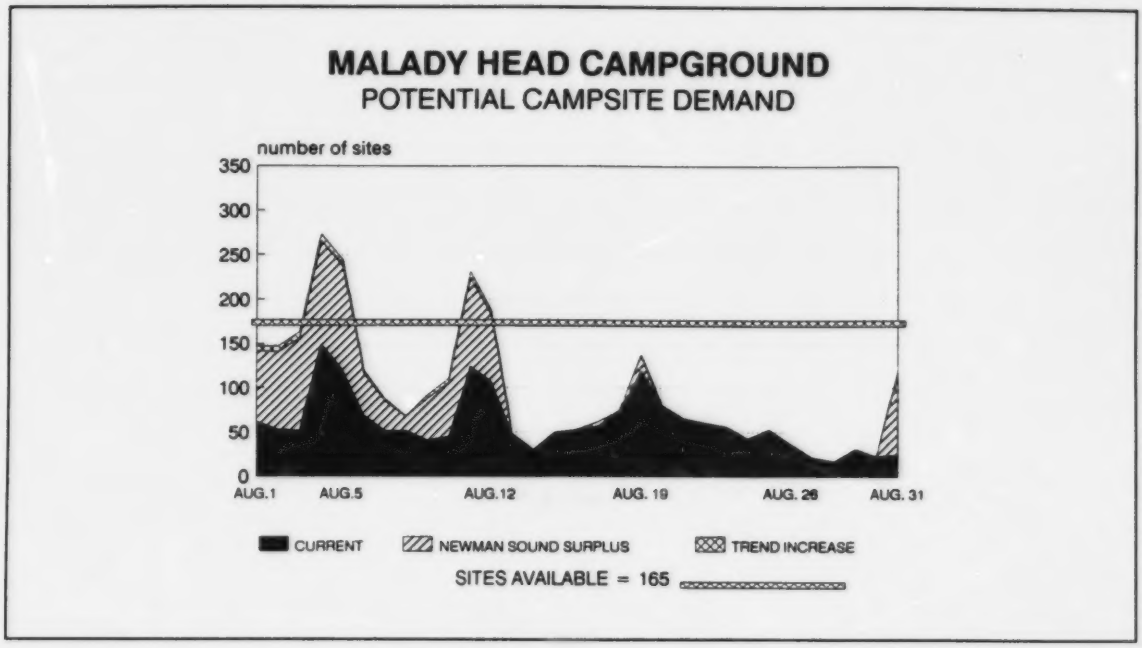


FIGURE 38



9.4 SUMMARY OF COSTS AND REVENUES

Detailed cost estimates developed by Regional Architecture and Engineering Services and Terra Nova General Works, are provided in Appendix C.

Capital Costs

Option A $1.99 million

Option B $2.79 million

Operating Costs

Option A $40,000. per annum

Option B $55,000. per annum

Revenue Accrued to Crown

Option A $203,000 per annum

Option B $333,000 per annum

CHAPTER 10 LIFE CYCLE COST ANALYSIS

What is immediately evident is that Option A costs about $800,000 less than Option B; however, Option B generates 65 per cent more revenue annually ($130,000 per annum). In order to compare the options, Life Cycle Cost Analysis was used. This approach allows the comparison of capital costs, operating costs and revenue over time by converting all future costs and revenues to net present value. The major investment in the campground occurs during the first 5 years of the campground's 25 year life. Revenue and operating expenses continue throughout the 25 year period.

The Life Cycle Cost Analysis shows that both options achieve the same relative economy (Option B showing a slightly higher return). In other words, the net cost to the Crown is roughly the same for either option. There is however a significant difference in terms of meeting contemporary and future demand. The provision of services provides the Canadian Parks Service with a 'contemporary campground' which will better serve the needs of today's and tomorrow's campers. Based upon Life Cycle Cost Analysis, Option B is the most favorable investment in terms of cost effectiveness and satisfying visitor needs.

Figure 39

LIFE CYCLE COST ANALYSIS

	OPTION A	OPTION B
DISCOUNTED COSTS $1990		
Buildings and other durable goods	$ 1,591,943	$ 2,129,421
Recurring costs (eg. operating)	399,389	523,280
Major Maintenance	0	0
DISCOUNTED REVENUES $1990		
Camping/vehicle permits	2,022,719	2,699,735
TOTAL NET DISCOUNTED COSTS	$ (31,387)	$ (47,043)

CHAPTER 11 ECONOMIC IMPACT

A project of this magnitude will have significant economic benefits to the regional economy. The benefits accruing to the park region are the result of two inputs;

Capital Development:

the injection of federal money into the local economy for construction over a 5 year period, most of which is highly labour intensive; and,

Visitor Expenditures:

additional visitor expenditures accruing to the local economy as a result of the additional length of stay which translates to additional labour income.

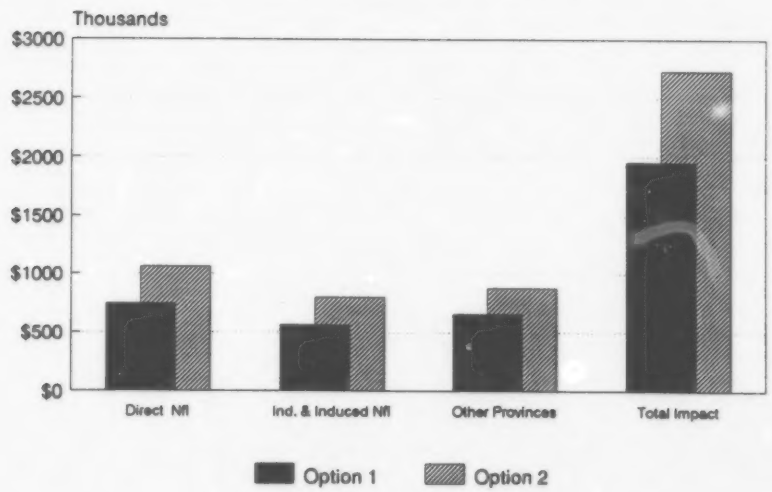
11.1 CAPITAL DEVELOPMENT

The introduction of a highly labour intensive project has an even greater impact in a non-urban part of Newfoundland where the unemployment rates are extremely high.

Using the Capital Project Economic Impact Model it was estimated that Option A would generate $1.96 million of direct, indirect and induced labour income with an associated

Figure 40

LABOUR INCOME ASSOCIATED WITH CAMPGROUND RECAPITALIZATION



Model: Capital Economic Impact Model

75.4 person years of employment. Option B would result in an estimated $2.7 million in labour income generating 104 person years of employment. These economic benefits would be distributed over the life of the 5 year period.

11.2 VISITOR EXPENDITURE IMPACT:

Unlike the expenditures associated with capital development, visitor expenditures result in an ongoing economic impact to the region. Campers who remain longer in the park region than other visitors (eg. day users) tend to leave more money in the area as well. Purchases of food, gas, camping supplies, souvenirs and other goods and services result in the generation of employment. In Fundy National Park, for example, over 60 per cent of the expenditures made in the local area are by campers. Unfortunately, without a survey to measure expenditure patterns in the Terra Nova Region, an accurate estimate of the impact is not possible. By comparison, Fundy National Park campers generate more than $300,000 in labour income annually. The 1990 Terra Nova Park Visitor Survey will measure visitor expenditures.

It would not be correct to attribute the total amount of the visitor expenditures to recapitalization. However, a reasonable approximation would be that the visitor expenditure impact would increase by as much as 30 per cent due to the increased length of stay.

REFERENCES

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Melanson, G., and de Lange, D., Camping Trends in Atlantic Region, Canadian Parks Service, Halifax, 1989.

APPENDIX A

COMMENTS BY NEWMAN SOUND CAMPERS

DESIGN

It would have been hard to do a better job at making the water tap harder to find!

Separation of tents not needed if water pumps available.

All campsites large enough for trailers and/or motor homes should be as level as possible and the entrance improved (trees removed, etc., e.g. site 402).

The toilet and shower facilities were too far away and drinking water faucets did not allow loose connection so we could fill our water tank.

Have garden hose connections on some of your water taps so that they can be hooked up to a trailer as motor homes.

Brighter lighting would also be nice. There is no justification for torn shower curtains. Also more clothes hooks would be appreciated in the shower stall. There are two very nice picnic sites at Sandy Pond with a wooden deck. More of these types would be nice.

Well screened sites with shade are very important. Dirt roads are fine. Your double dump station is very good. Most provincial parks don't have one. I would like to see a few more water faucets with threaded ends so we could use our own hose to fill our trailer tank. Travel trailers are self-contained units and should not have to be hooked up to electricity and sewer connections. But, a few more threaded faucets, please, for water. Filling at the dump station on the way in could be a problem if the facility is being used by others for dumping, threaded faucets should not cost much.

Our site number was 39. We were confused to say the least as number 38 and 40 on either side were not clearly marked as to where to enter them.

I don't think that tents/rec. vehicles should be segregated. I think everybody should have equal opportunity for all campsites (suitable to their needs). But if hook-ups are introduced, I think they should be in the new part of the park, and leave the old part to "true campers".

I think we should be allowed to dispose of waste water through hose on campsite.

Would like to see more open field sites with water, electricity, and sewer.

There should be light in the kitchen shelter for those arriving in the park late at night, wanting to get a meal.

Garbage cans are too far from campsite.

I would like to see rest benches along the trails.

Campsite and roads are not designed for large travel trailers. Some sites are large enough but access to them is not good enough. Malady is ridiculous. All 90 degree turns and roads are too narrow. Since not being able to camp at Terra Nova we have encountered numerous other parties who were travelling with rather large rigs and had similar problems. A trailer or fifth wheel vehicle can be anywhere from 33 feet to 55 feet or longer. Campsites are big enough but access is such that turns cannot be made to get into sites without damaging the vehicles. Our suggestion would be that a number of sites be available as a drive through or mouths of existing sites be widened and angles lessened.

Move check-out slot higher for motor homes.

When designing facilities, design for function not just for some architect's ego needs. Get input from those who operate and maintain the facilities and really listen to them. Efficiency and economy of operation are more important than aesthetics.

Some sites are totally confusing. Is it a campsite or walkway, i.e. #70.

There could be a section, preferably in the A/B area, re-designed to accommodate year-round campers. A trailer-court type idea, aesthetically landscaped (about 25 sites), fully-serviced, where campers who love Terra Nova could rent a site on an annual basis, i.e. $1200. Roads should be kept open and one washroom and one kitchen shelter maintained year-round for that section. Sites are very poorly defined (as to the exact site location).

Sites can be determined by erecting posts or rails. Recommend that management visit Berry Hill, Green Point and Shallow Bay campgrounds at Gros Morne N.P.

You should have a section of open campsites, we do not like to be in the deep woods.

Moved to Malady Head because campsites too open at Newman Sound.

Thought there would be an area where we could view the area without hiking the trails.

A solution would be one or more area of the campground where these vehicles must go; or, one or more areas with equally good facilities - (often tenting sites have inferior washrooms, etc) where generators and other noise (TVs, etc) are not permitted. Please consider this in your plans. Thank you.

We would have liked to be closer to shower/water.

I think separating families with children would be a good idea - or asking if party was interested in children being nearby.

Suggest you make plan available to attendants stating size and over-head clearance of campsites in order that motor homes and large trailers can be directed to the proper sites, without damage to the vehicles.

Campsites could be a bit bigger.

A tree in the middle of the site made parking the trailer very difficult. It did not enhance the site at all.

The park facilities are too spread out. I realize that little can be done about this now, but any future planning should consider development near the campsite area. Most people do not want to be constantly driving a car to get to a facility.

Difficult to distinguish one campsite from another.

We would have liked to be closer to shower/water

Do not need to separate tents and vehicles.

I get the feeling from your questionnaire that consideration is being given to separate campers by type of camping unit. I feel this would be ridiculous and would discriminate against people who cannot afford larger camping units. I think more thoughts should be given to separating families from groups of young adults who wish to party into the early hours. To separate motor homes in one group, travel trailers in another etc. would almost create or establish your own in park social separation from rich to poor.

We feel there should be an area set aside for family camping or for people who do not wish to consume alcoholic beverages. Somewhere where people can enjoy the beauty and quietness of nature.

Separate adult only campers from families with children.

If segregation is by type of equipment used and we as a family are forced to go in areas mainly occupied by singles and younger people we would not camp at Terra Nova Park in the future.

FEES

Prices unreasonable.

Extremely expensive for sites.

Much too expensive per night, also there should be a cheaper weekly/monthly rate.

Don't price yourself out of business. Your fee schedule proposed above seems high, compared to experience of over 1 year and 30,000 miles.

I have been a visitor to Terra Nova Park since it was opened and to this area even before the park was opened. I enjoyed the scenery and many other things, but there was a time I had a personal boycott against the park because of fee increases and restrictions. I still think the park is over regulated and this takes away from some of the pleasure that myself and others get from being here.

Price high, we had the same hookups for $9.50/night at Codroy Provincial Park, West Coast. First try 100-150 hookups for people who would like to get one, if not get one without hookups.

All too high, total $12.00 as elsewhere.

The rates you indicate are too high.

Campsites are too expensive.

Too expensive for fee, all three fees.

Too high for fees.

I don't see why you should have to pay for this type of recreation. People pay enough now just to get in this park - it is ridiculous! For the price of $8.50 per night, I was extremely pissed when I was told I also had to pay $3.00 for my vehicle per night. Your charge for use of the park is way out of line. You are catering to the rich and not the average Newfoundlander or tourist for that matter. I really believe the cost is a rip off to the business of tourism.

The cost of staying in this park is very expensive considering the facilities that are provided. All we get is garbage disposal and a free shower, and that has been provided for the past 25 years. Its about time that we can see some improvement for our money. After all it's the middle class people that are keeping this park going. And, in my opinion, we are being taken to the cleaners. Why should the public have to pay to keep their car in the park. That's our only means of transportation and we are really being taken advantage of. It's a real rip off.

We do not understand being a camper in the park, having to pay the extra for a pass to use the park.

The registration and recreation department should accept all major credit cards, necessary while travelling.

I feel that senior citizens should have at least their 10% discount!

$10.00 is expensive for no facilities.

More family group rates needed in recreation areas. Adult rates for a 12 year old has made us think twice about taking the boat tours, etc.

The proposed prices for serviced lots are out of line with other similar parks.

I appreciate the fact that the weekly camping site is cheaper than the daily rate.

I think the charge for being in the park should be abolished (not added on to price of camping) - it's ridiculous - charge on charge - tax on tax. It should apply to visitors only. This should be for all Parks Canada.

We would never come back. It has been the most expensive campsite we have had in Newfoundland and the most disappointing. Very dissatisfied with Newman Sound; it ranks the worst of all campsites we have had, provincial or national, and at $8.50 plus $3.00 permit, the most money. No recommendation from us will be passed on to other travellers by us, in fact we will advise them to miss it.

$8.50 is too high when it is only $6.00 in provincial parks plus fire place and fire wood.

The rates for serviced lots quoted within are excessively high, in fact, the highest I have seen from Central Canada and U.S. to here. I would not stay here at those rates. It is just another example of the typical Newfoundland rip off.

Prices too high for a national park. Rather have hook-ups but not at that cost. Pippy Park gives full hook-ups at $12.00.

INFORMATION

Very difficult to find out which trail in the description is the trail on the map. You can't find every name on the map. There should be numbers.

Self-guided trail maps over guided tours.

Campground map is poor. With no campsite numbers you can't orient yourself easily (only 4 needed per loop).

We were given the park map and sheet with detailed hiking trails. But the hiking trails are not identified on the map with the same names as on the trail description sheet. It was difficult to determine where the trail heads were and where each trail went. Suggest numbering the trails on map and description sheet as at Gros Morne.

Need a guide to the trails and possible information posters on parts of trail explaining habitat, points of interest, etc.

The park map was not clear enough. Each campsite should be placed on the map. This would make it easier to find your way around.

I would suggest that trails be marked - how long (in miles and km) and a map showing where it goes.

More self-guided trails needed, no check list was available.

Information, publication, i.e. Tucamore Gros Morne, would be greatly appreciated.

Map of area does not quite match way roads look immediately after the kiosk, but I was given excellent instructions.

Trail information poor.

I believe Terra Nova, like Gros Morne, should have: accurate, descriptive park map and directions for all facilities, trail, and neighbouring off park amenities.

Partial or fully numbered campsite map - late in day it is confusing.

Readable camping area map. The one in the Newman Sound brochure is really inaccurate and not understandable.

Pamphlets with information on hiking trails. Example, distance, type of trail and destination. Distance of trail measured at 1 km intervals.

Brochures should read "unserviced" sites. To many people, semi-service means electric and water hook-up.

On your reservation number hand out it should be mentioned that a 24 hour notice is required.

In the brochures, it states that camping facilities are semi-service, which is misleading. In the same booklet, when semi-services is indicated for the private parks, it means electricity and water, etc. Didn't know a 24 hr. appointment had to be made and book golf course.

Is there a place to stop the car and park to hike into Kelly's Pond? We only found places to park at the picnic table sign and hiked along Southwest Brook. Information opened at 10:00 We and another party were there at 9:30.

We were not given adequate information on boat tours. We were unable to participate as we found out too late that reservations must be made the day before. Very disappointing when you have come from so far away.

We found hiking trail information to be lacking and conflicting to someone unfamiliar with the park (not to mention, disappointing in that so many trails are listed as "not maintained". The "Terra Nova Trails" sheet is not very helpful. Where do the trails begin? Where is the tower? Where is Salton's? Where is Green Cove Head? The answers can't be found in the map or in the park newspaper. We did eventually piece together, the information we needed. The most helpful information is on the trailers bulletin boards, but how can one memorize it all to plan a hiking schedule. I suggest that the information printed in your "Sounds" newspaper instead of that sketchy little chart on page 3 and include the maps with numbered trails. We love to hike and don't like to waste time trying to figure it all out. At other Canadian National Parks, it was all super clear and nothing but a pleasure.

INSECTS

Nuisance insects wasps - please spray to kill these or at least lower the number. Two of my three children were stung.

Your bee problem at campsites posed a serious health threat to my son. Had I been aware of this in advance, I would have made other arrangements. Bees are part of any outdoor experience, but here their numbers and constant presence on sites posed a life threatening situation for us causing us to shorten our stay.

I think something should be done about the insects and flies.

"Dissatisfied" with number of wasps flying around. Unable to eat outdoors with satisfaction.

This year and last year campsites alive with ants.

Important to spray for wasps.

We moved from site 132 due to a large number of wasps swarming the site.

I think something should be done about the insects and flies.

Too many wasps.

INTERPRETATION

The playground could have more equipment to increase the children's sense of adventure. Example, rope walkways, and other natural play equipment.

Put in a short interpretive trail and label the native plants, trees, flowers, etc.

Programs need to be arranged by age groups.

Why not start a system of Natural History/Cultural History Cooperating Associations (non-profit). They are used in the U.S. National Park System and many State Parks

Systems to generate funds for park interpretive programs and activities. I did not see any evidence of such association in your system. Citizen volunteer programs can enhance the capabilities of the professional staff, that is unless you have an unlimited budget!

Evening program not informative program, geared to entertain your children.

I was displeased to see native people portrayed as "murderous cutthroats lurking in the woods on your walk home" as portrayed by "The Storytellers Show". On the whole, felt they made a good dramatic effort but it dragged. Why not be forthright? Now I will tell you a story about how Happy Adventure got its name. It has 2 endings. Which one do you choose? See Bob Basten's book on storytelling. Many tips use by the Canadian master storyteller are involving the audience, choosing material well, etc. The "Terra Nova Sound" - a clear title - does not measure up to the "Tukamore" - of Gros Morne. More short pity articles needed.

We feel the program "with my rubber boots on" was misleading as advertised. We thought it would have been musical and more entertaining for adults. Perhaps even comical. It's a rip off.

On rainy days, it would be nice to be able to pass the time by viewing films or videos relevant to the park or to Newfoundland. There are a couple of short ones presented at the visitor centre, but they are quite brief. The National Film Board has lots of material on natural history, recreation, etc, and even though it is not about Newfoundland, it would be interesting to most viewers. Another, example is an edition of the CBC production Land and Sea that deals with the Newfoundland black bear population.

Interpretive programs seem to be geared to the young audience and do not contain much for those other nature buffs in your crowds.

LAUNDROMAT

While there were an ample number of washing machines there were too few driers (4), one of which was out of order and 2 which were being used by an employee to do sheets for cabins leaving only 1 for campers to use. Could use another laundry, had to wait!

In desperate need of more laundry facilities.

Not enough washing machines.

Poor facilities. Too much machine time taken by Weston's - took 4 1/2 hrs. to finish.

Laundry facilities - not enough, too busy.

Too few laundry facilities.

Laundry should be enlarged and opened early so day not wasted.

More laundry facilities.

Very frustrated that the second laundromat is not open, this causing long lineups and waiting everyday at the only open facility.

More laundromat locations.

The laundromat facilities were alright, but not enough for a park this size. Also, the staff should have a separate laundromat.

Would suggest that laundry facilities enclude more washers and dryers plus an extension of the hours, maybe a 24 hours service.

Need more laundry facilities to serve such a large number of campers.

Need more laundry facilities.I believe the laundry facilities are very inadequate for the large number of people using them. Cleanliness, etc. was alright.

Laundry facilities should be reopened in the newer section of Newman Sound.

One laundry facility is not enough. Use by Westons for their own use while campers wait for washers and dryers is not acceptable. Westons were using two dryers while 2 or 3 campers had clothes washed, waiting to get a dryer to use.

Expand laundromat facility several times. Set up additional ones in the campgrounds.

The laundromat should be used for park campers, it is quite often used for the park cabins which is a private venture. Leave the park facilities to the park users.

I think the laundry facilities should have more washers and dryers, or have more laundry facilities. You waste a lot of time waiting.

Laundry facilities should not be used by Westons in washing laundry for the cabins in the park. With so few washers and dryers, there is usually one to two washer, 1 dryer in use for this purpose.

Laundry services in our area closed during our stay.

MAINTENANCE

Excessive garbage in bushes around many campsites, more manpower needed to keep campsites clean, many users careless.

Clean up grounds, ie. beer caps and cigarette butts, at campsites.

Lots of butts, caps at campsites. Showers not clean.

Dusty sites.

The old fallen trees make the park look most untidy. Tourists must wonder why we leave them there year after year.

I know the season is almost over, but there is too much litter around - also at Gros Morne. This includes both new and old litter.

Daily inspection of campsites by Rangers to enforce campground cleanliness by tenants.

I would like to see some of the trees trimmed out in many of the sites, especially sites like 2-4 and others, and the old trees lying on the ground tucked away to beautify the park a little more.

I have camped at many parks in Newfoundland during the past 25 years and Terra Nova appears the worst for noise, abuse, uncleanness.

One of the reasons we enjoy visiting Canada's national parks is the concern for the environment. All parks are clean and well-maintained and continued effort is made to educate tourists about being careful.

The campsites can do with a good clean-up (raking, etc.)

As in Malady Head, the campsite was a disaster with trash everywhere. The garbage had been collected but the site was covered with beer bottle caps, plastic bags. If you want to become world class in littering, I suggest you come to New York and see how the pros do it.

Surrounding area very messy - with paper, etc. Needs a good cleaning.

We found the campsites to be poorly maintained - tremendous amount of litter and trash everywhere.

Campsites need to be raked from time to time because some campers leave bottle caps etc., and this is dangerous for young children.

Campsites are trashy.

Terra Nova is a beautiful national park. It is a real shame that the majority of its users don't respect it very much. We found garbage from one end of the campground to the other and not for lack of garbage facilities. I hope the local users soon learn that this fine park is not a renewable resource to be preserved at some later date.

The so-called maintained trails need trimming in places (for example, Newman Cove) so you don't get soaked legs after a rain.

Fix roads by filling in pot holes or better yet, blacktop the main roads.

The campsites could be cleaner. We were assigned #30 at first and it was filthy, e.g. coke bottle, leftovers, toilet paper all over, and it really stank of urine.

The campsites need to be cleaned of cigarette butts, bottle caps, etc. - they make sites very dirty.Pavement on the main roads would also be nice.

The main roads in the Newman Sound area should be graded more often. There is no need for roads with potholes.

Some sites were littered with cigarette butts, beer caps and 8 pull tabs.

Dirt all over picnic tables.

No grass on our campsite.

Street lights on main road ways.

Replace metal garbage cans with plastic.

Most campsites are screened too much by trees. They should be more sites like #'s 214, 215, 216, (L area) and grassed part of sites. They last several times longer. Pass bottle law - throw away beer, soft drinks, etc. Cans and bottles will cover the park if you don't wise-up. Fix roads by filling in pot holes or better yet, blacktop the main roads. Move check-out slot higher for motor homes.

#160 has no post with number on it.

Campsites to be cleaned with disinfectant twice a year.

Our site, 339, was covered with beer caps and cigarette butts and many ant hills. I think the sites should be cleaned at least once a week. We found toilet tissue strewn around the site as well.

Our campsite had beer caps, cigarette butts and other miscellaneous garbage all around it and no garbage can.

I have visited almost every provincial park in this province. The difference I notice between the national and provincial parks is that in the provincial parks, the tables and campsites are kept clean after each visitor leaves. This is not done in the national parks. People should be encouraged to keep the campsite clean. This would include the tables and the picking up of cigarette butts and beer caps.

Not obviously the fault of Parks Canada or its employees, but of the campers/visitors, a good campground is spoiled by litter. I hate pitching my tent among cigarette butts, bottle caps, and scrap paper, as most people do. The Newfoundland Provincial Parks seem to do a better job, in my limited experience, at keeping the sites litter free or at persuading the campers to do so. This is a problem, of course, in all public places. I would prefer to see less Parks resources/budget expended on flush toilets and more on litter prevention clean up. I have not seen one sign or pieces of literature urging cleanliness. Perhaps, you would be preaching only to the converted.

NOISE

No generators should be allowed to operate in the park. Electrical hook-ups would eliminate problem.

Restrict use of generators to day-time hours. (say 10:00 a.m. to 2:00 p.m. as in most U.S. national parks we experienced neighbours here who thoughtlessly used generator until midnight and beyond. Very annoying. If we wanted such noise/disturbance, we would have stayed in a city.

Campsites a little too close to highway.

Therefore, we were very dismayed to note that this concern does not extend to noise pollution. If we come to listen to the wilderness - sound of wind, birds, sea, etc., it is most unpleasant to go to sleep and wake up to a chorus of RV generators at all hours.

Enforcement of quiet hours. We got almost no sleep because of the noise and rock music of other campers all night long.

When possible, people who plan on using generators should be placed in a separate area

By midnight one should be able to expect quiet and not be disturbed by having to get in truck and go search out help.

We were disturbed by the noise of a generator from nearby camper vans. Disallow them or separate users from non-users.

Get rid of generators. I have a travel trailer. I do not need them for facilities. There is nothing worse at 11:30 p.m.

Very dissatisfied with security. Camp next to us was loud and music for hours and yet until we went and complained, no security was around to quiet this group.

Portable generators have no place in a campground unless they are extremely quiet. Many are not and, therefore, benefit a few at the expense many other people who do not enjoy the constant noise from a gasoline engine.

I don't think we should have to turn off generators at 11:00 p.m.

Gas generators such as those used by large trailers should be outlawed as they keep other campers awake.

Newman Sound too noisy. Too close to fun slide and park.

It would be nice to see those who enjoy music night or day keep it to themselves. Most everybody enjoys music but when it is blaring at you and you are several campsites away, it can be annoying.

This is not a peaceful, quiet, and separate enough campground. Highway noise awful.

Although we were quite satisfied with our trip, it is extremely hard to enjoy peace and quite when you have every other campsite displaying their taste in music very loudly. I feel there should be stricter rules on loud music and parties.

Although park regulations clearly indicate that strict quiet should be observed up to 11:00 p.m., we found that there was no attempt to ensure that campers were not disturbed by the loud parties and radios of a few groups of individuals who were making noise until nearly midnight and they only stopped because it started to rain. Perhaps a campground as large as this one could be divided into separate areas for persons wishing to enjoy a quiet holiday in a natural setting and other areas for persons wishing to have outdoor parties. One way to accomplish this might be to prohibit radios, alcohol, etc. from one section of the park, while allowing their use elsewhere.

PETS

Please no dogs allowed.

Also, several times this trip I have experienced people taking dogs in bathroom with them. Some people fear dogs especially in enclosed spaces.Too many dogs in park barking at squirrels, rabbits, etc.

Dog droppings all over the place.

I suggest that dogs be banned from the Park, they are a real nuisance and owners often neglect to keep them on a leash.

A serious problem exists with pet control. On 3 occasions a dog roamed around our site. At Sandy Beach we were subjected to the same dog roaming, had to drive it away several times. We had to get out of the water when a person took a large dog out into the water for a wash. Three of your staff were on the beach during these times and didn't respond. Your efforts to improve the park are welcomed, but I seriously feel that a greater effort to control what you already have is needed. I have camped here for the past twenty years and, honestly, I fail to see any improvement. For a federal funded park, I guess we got what we got from other federal departments, the end of the stick.

SATISFIED

This is a great park. We are glad to see the Administration making efforts to make it even greater.

The park workers do wonderful work in spite of cut backs by Government.

I found the park attendants, wardens and security people very cooperative.

Most of the Newman Sound staff are to be commended for their diligence, competence and superb public relations. I casually and randomly observe these workers in their work and dealings with all kinds of people all summer long and they are just excellent. Keep it up.

Staff were extremely helpful. They were patient, friendly and very informative. Anytime we had a question, they were more than willing to supply an answer. The camping facilities are excellent. We are overnight campers but did stay an extra day to enjoy the park. Our vacation (9 days) in Newfoundland has been most enjoyable.

On both occasions the registration attendants were most helpful and courteous.

I do not know how you would do it, but perhaps you could advise Newman campers of delights on Malady Road and beyond.

You have a beautiful park and we enjoyed our stay here.

Your park is well run and we have enjoyed it.

We have spent almost 3 weeks here at Newman Sound and have thoroughly enjoyed ourselves. We would like to say "Thank you very much" to all the staff who have been very kind and considerate to all of us.

When our family was young we spent considerable time at Terra Nova National Park and always enjoyed it, and never had any problems with it. And the family always took part in various activities.

Congratulations to the people running the outdoor entertainment. They do an excellent job.

We don't feel the park needs to be improved. It's great the way it is!

Your park is well run and we have enjoyed it.

We were well pleased - Thanks.

The park was great. It was my first time here but definitely not my last.

Had a great stay thanks.

SECURITY/CONTROL

Stringent rules were published for Labour Day weekend, but these rules were easily manoeuvred by campers without staff being alert to such action or procedure were not put in place to curb these action. Many sites were obtained by false pretences.

We really like this place, but we really couldn't see the point of the security at the gate that often caused traffic tie ups as well.

There were stumps in the site, and others I visited, that people, especially children were inclined to trip on.

The fact that you can't come in and drive around and visit I deplore. It used to be a pleasure on a Sunday afternoon to drive around and visit the campsites and other areas and that with friends that may have been in the area. New friends have to park outside and leave at certain hours. Some of us are not clock regulated when we are on holidays. Also some people enjoy themselves in different manners. This area is being financed by taxpayers money and also by fee structures we all have to pay to enter. The area is large enough to divide into areas for use by different groups of individuals, older people. Senior citizens, who want to be asleep early could be sent to a particular area, middle aged with children to another part, party people and those who stay up late to another area and none would interfere with the other.

Teeter totters are dangerous.

I have noticed that many sites are officially occupied when in fact the party has moved out after four or five days. In fact, sometimes the park is considered to have no vacancies when in fact many sites are empty. Also, it may mean that campers are relegated to the less desirable sites when some of the prime locations are empty. Perhaps this problem could be alleviated by making a stronger effort to encourage checking out or depositing camping permits at the commissionaires station.

Requests on two occasions during the night for assistance/reinforcement by park officials - had little or no effect.

Side mirrors should be removed from vehicles once trailers are parked. The roads are not wide enough to accommodate safe walking.

Should have a speed limit in campground. Cars go too fast for children.

A decisive effort should be made to prevent Newman Sound from becoming an open air bar on the May 24 and Labour Day weekends.

Quiet curfew is now at 11:00 p.m. which is reasonable. However, when patrolling for this quiet time, by foot would be a better indication of what is actually happening in the park. Strict enforcement of this policy should occur after 12:00 p.m.

Some of the wardens don't use common sense in their actions. Ex: In a campsite next to mine, a warden came at 4:30 a.m. to wake up a person to tell him he had forgotten to pay up for that night. He woke up not only the family in that trailer but my family and my friends' family in nearby sites. I felt he could have waited until a decent hour to inform the people. What was the difference between 4:40 a.m. and 8:00 a.m. Also, having to be out of camp kitchen by 11:00 p.m. Most people don't come camping on holidays to be in bed or trailer by 11:00 p.m.

Staff rude to visitors who came to see us after 9:00 a.m.

I am happy to see that the park is being policed especially around the 11:00 curfew to see the drunken drivers curtailed.

ADDITIONAL OR IMPROVED SERVICES

Parties with children under age 6 should have priority in playground area. Party should be in attendance at wicket in order to be assigned a particular site number. At 9:30 children's program is too late for most children to attend, we would like to be there.

I would like to have service hookup, but I think the prices mentioned in this brochure are too expensive.

The idea of a shuttle service to Sandy Pond would prove a convenience.

Have the head waters of Big Brook dammed and let the water off the middle of June and once again, salmon will be running on that lovely little river.

Would be very helpful to tourists if credit cards were accepted.

The main thing that can be done to improve T.N.N P. is to provide service hookups.

Accept credit cards with minimum limit of say $25.00.

I would also like to see adequate parking at Sandy Pond.

Only camp at Malady Head until room available at Newman Sound.

Important not to have to boil drinking water.

Restaurant served terrible food, high prices, closed too early.

Why can't you have fires at campfire. You can at Malady Head.

It is ridiculous not to have hookups.

Campsites much too crowded.

Children's programs were too late in the evening.

Hot & cold running water.

Need grassy spots for tent sites.

Should be trailer sites at Golf Course.

Overall, I am presently satisfied with the park and the activities. It would be nice to have some serviced sites

You must give better services (ie, water & electricity) and also recreation fields. The services in this park have stayed the same for the past twenty-five years.

Tents need electricity, too.

More campsites with full service.

Has any thought been given to drop-off at start of hiking trail and pick up also by a van 2x4 during the day once or more per week?

Considering the investments today for trailers and motor homes, I think it's time that we did have 3-way hook-ups. After all I did not buy my trailer to enjoy the facilities of mainland parks. I enjoy our own country side and province, but we are always one step behind when it comes to offering 3-way hook-ups.

Place to refreeze ice packs. Permits available at Sandy Pond. More garbage containers outside.

Children's programs are good and very informative. But their frequency and availability should be reviewed to accommodate campers who are here for shorter periods of time.

Checking into the park is far too slow if several people show up at once. Please, evaluate this procedure as it is probably a success for statistics collection but a practical failure.

Area across from T-section should be landscaped and equipped with 3-way hook-ups with all open sites. Twin Rivers is an excellent golf course but campers have difficulty making reservations. Each campsite should be permitted to have fires.

Too many sites are left vacant while campers are not able to get a site.

There is a critical need for serviced sites in Newfoundland particularly for visitors who are more used to having these services available. We always use serviced sites when available.

Newfoundland park need more sewer dump station.

Malady Head not close to anything - store, playgrounds.

Golf course, too difficult for average player.

There should be a swimming pool in the Newman Sound campground.For a park with over 400 campsites there should be at least a couple of swimming facilities available in the campsite and not to have to travel 3 to 4 km. each way. And when you get there you have to park in the overflow with a 1\4 of a mile walk, with children, lawn chairs, etc. I have walked 1\2 way and turned back disgusted with the situation (especially on a very hot day). It's not good enough for this park when there seems to be good facilities right in the campsite that could be utilized.

Cannot emphasize enough the importance of a couple of large swimming pools in the park.

A swimming facility at Newman Sound.

Swimming facilities are needed in Newman Sound campground. A pool utilizing the water from Bay Brook could easily be put in place. It is stupid to have swimming only available with the use of a car.

There is a need for indoor swimming due to unpredictable weather.

I think it is important to have a swimming pool at Newman Sound.

SIGNAGE

Terminology is misleading i.e. "washrooms and showers" ours had no showers (Shower symbol omitted from legend) also sites. Maybe you could move the sign out to the road where it could be seen.

Had difficulty finding Newman Sound Campground. Visitor center man said, "Turn right at top of hill and right again past buildings". He did not say there would not be a sign.

Need a sign to tell people to park and walk to check station to register for camping. We drove into parking lot and did not see any further directions (instructions).

There should be signs indicating store.

The shower symbol not shown to say showers and toilets.

Park signs are so confusing, it is incredible that people even find their way around the park, or enter the park from the Trans-Canada Highway.

On each of the trail marking signs, it should say the length of the trail, also along the trails, amount of km covered i.e. a marking at the halfway point.

In addition to numbering the campsite, add the letter of the site to the sign "Y" 396, etc.

I feel that first time campers have a problem finding the camping area, etc. because of poor signage.

In park signage arrows are confusing. Move slightly exit from campground to Malady Head - is blind on left turn with camper.

Number on post was beyond the campsite and almost covered by bush.

How about some signage to discourage those infernal "litterbugs"?

STORE

Prices at the convenience store are outrageous, ie, $1.99 for small bottle of beans and $1.15 for Kraft dinner, just a couple of examples. In a St. John's supermarket, Kraft dinner is $.79, in Traytown it was $.99. The management of this store should be brought up on this matter and not allowed to operate.

Commercial ventures have no business in recreational/national parks. The idea is to get away and enjoy the environment. If the public needs services like groceries, laundry, food, etc., let them go outside park boundaries.

Not pleased with prices or availability of certain supplies at store.

Too expensive and nothing in stock, ie. weiners, cream, etc.

Convenience store too small.

Convenience store open May 24 onwards.

The convenience store in Newman Sound is generally too expensive. The excuse that the operator has only 2 1/2 months business is not void. Nobody should expect to make 12 months wages in 2 1/2 by squeezing captive families. The operator could do better by offering a larger selection of items in a better stocked store at lower prices. But then again this method of doing business is standard fare in Newfoundland.

Convenience store much too expensive.

Too expensive.

Convenience store too expensive.

No ice in convenience store.

Convenience store at Newman Sound are expensive and not updated much over the years.

Convenience store out of ice.

Outrageous prices at convenience store.

Co. enience store, expensive, slow service.

Too expensive at store.

WASHROOMS

One toilet plugged. Services other than electric are not needed if present showers were enlarged, more showers, more toilets!

Couple of chairs or stools or bench along one wall in the washrooms would be nice for those waiting in line for the showers, especially older campers or those with arthritis, leg problems, etc.

The washrooms should be maintained on a more constant basis. The sinks are generally dirty in the evening and in the morning. Make paper towels available and most people will clean up after themselves. Brighter lighting would also be nice. There is no justification for torn shower curtains. Also, more clothes hooks would be appreciated in the shower stall.

Men's shower needs longer curtains to prevent water on floor. Also showers should have lathes on concrete floor to stand on when showering.

Need larger bench in shower stall and more hooks.

Place your urinals away from the door so that all the park can't see you when you are using them. They are useless the way they are in a section. No one will use them as they are.

Showers are important, yours are very good. If you have money for expansion, you might put it into more showers.

Showers needed in all washrooms.

Hand towels in the washrooms.

Soap and paper towels extremely necessary for washrooms.

Must go through someone's campground to reach washroom.

Bathrooms at Sandy Beach, I told my boy to pee in the woods so he would not have to be subjected to the stink. Washrooms in our section were almost inaccessible without going through someone's site. Proper entrances were hard to find.

Washrooms need to be enlarged in A & B with more showers.

Air dryers should be installed in washrooms.I feel that the last campsites were neglected.

Sections T, U, W, and X had to use the same showers. I think a shower should have been put between T, U, and S. Also, Q, R, and S, had no showers. If a shower was put between T, U, and S, it would be much more convenient for everyone.

The toilets are long way from sites. Again, more, clean pot toilets could be preferred to scarce flush toilets with electricity. Like all federal parks, you are trying to do a good job and we appreciate it.

I strongly urge you to put in flush toilets at Sandy Pond washrooms - the smell is atrocious! In a park that is so lovely. As well, we got up early to drive to the showers closest to us only to discover them locked and no indication of when then would open.

Please, no smoking in bathrooms. This is a big problem for non-smokers since smokers are not always considerate of other people.

APPENDIX B

FACTOR ANALYSIS SCORES

ROTATED FACTOR PATTERN

	FACTOR 1	FACTOR 2	FACTOR 3	FACTOR 4	FACTOR 5
LIFEGRDS	**0.81548**	-0.08355	0.03011	-0.05550	-0.06445
PLAYGRD	**0.75517**	0.00537	0.14394	0.01394	0.08163
OPENF	**0.75981**	0.06046	0.17056	-0.03311	-0.02624
KIDSP	**0.75003**	0.03243	0.14545	-0.06948	-0.05028
NEWF	**0.70988**	-0.10054	-0.25456	-0.06965	-0.00887
LAUNDRY	**0.52119**	0.20372	-0.05004	-0.09217	0.05838
STORE	**0.50497**	0.05158	0.01012	-0.03807	0.03026
SANDB	**0.45544**	0.06800	**0.36865**	0.19247	0.13660
PARTY	**0.38567**	**0.03439**	**0.04221**	**-0.03210**	**0.46390**
CLEANW	0.17690	0.01361	0.02301	0.02120	0.05487
FUNLAND	-0.21710	-0.16225	0.02160	0.09706	- 0.11407
SANDYP	**-0.59059**	0.12710	0.23194	**0.27975**	0.00606
SPLASHP	**-0.57285**	-0.07686	0.19582	0.21456	-0.17999
TENT	-0.03380	**-0.66847**	0.12286	0.01875	**-0.39629**
NOWAY	-0.06099	**-0.55980**	0.04776	-0.08712	**-0.53806**
TWOWAY	0.03291	0.13512	-0.07791	-0.09627	**0.52087**
PAVEDR	0.04048	**0.45843**	0.20726	0.14632	-0.03853
THREEWAY	0.15370	**0.63513**	0.06271	0.15878	-0.14071
RV	-0.13423	**0.79785**	-0.15158	-0.07163	**-0.14100**
NEARO	-0.04932	-0.07746	**0.67870**	0.07981	-0.06071
SCENERY	0.10688	0.01848	**0.52612**	-0.28305	-0.12035
SCREENED	-0.07382	**-0.36265**	**0.46264**	-0.12092	0.02906
SPACEC	0.33260	-0.13020	**0.39862**	-0.04958	-0.08523
SEPARAT	-0.12145	0.04929	**0.51298**	0.04912	-0.00994
BEINGI	0.00790	0.15910	**0.40269**	- 0.11628	0.00346
FIREP	0.16627	-0.05651	**0.43558**	0.16588	0.01159
MAINTS	0.22489	-0.09237	-0.23318	0.00612	0.15531
OCHREH	-0.20179	0.12785	0.06536	**0.55347**	0.17025
HIKE	0.00368	0.08691	0.02722	**0.49828**	0.06737
BLUEH	-0.23229	0.11832	0.13538	**0.43640**	**-0.01696**
INTERP	-0.04389	-0.00773	0.03979	**0.53115**	-0.20176
PICNIC	-0.17080	0.13466	-0.04219	0.33737	-0.25571
VRC	0.08997	0.01898	-0.04053	**0.55051**	-0.01429
BOATT	0.04611	-0.08790	-0.24649	**0.40198**	0.00723
MALADYS	0.02340	-0.04322	-0.14875	0.33165	-0.00206
STAY	0.24550	0.05749	-0.08493	**-0.38834**	-0.13796
TTRAIL	0.19172	-0.18420	0.04629	0.06578	**0.63647**
ONEWAY	-0.13295	-0.09980	-0.05983	0.06752	**0.37012**

Variance explained by each factor:

FACTOR1	FACTOR2	FACTOR3	FACTOR4	FACTOR5
5.456631	2.503115	2.375022	2.310863	1.848717

EXTENDED VARIABLE LABELS

LIFEGRDS	Supervised Swimming
PLAYGRD	Playgrounds
OPENF	Open Playing Fields
KIDSP	Kids Programs
NEWF	Newfoundland
LAUNDRY	Laundry Facilities
STORE	Campground Store
SANDB	Sandy Beach
PARTY	Party Size
CLEANW	Clean Washrooms
FUNLAND	Fun Land
SANDYP	Sandy Pond
SPLASHP	Splash "N" Putt
TENT	Tent Campers
NOWAY	Unserviced Sites
TWOWAY	Electric and Water Hookups
PAVEDR	Paved Roads
THREEWAY	Three-Way Hookups
RV	Recreational Vehicle
NEARO	Near the Ocean
SCENERY	Scenery
SCREENED	Sites Well Screened
SPACEC	Size of Sites
SEPARAT	Separation of RVs and Tents
BEINGI	Being Informed About Campgrounds
FIREP	Fire Pits
MAINTS	Maintenance of Sites
OCHREH	Ochre Hill Look Off
HIKE	Hiking
BLUEH	Blue Hill Look Off
INTERP	interpretation Programs
PICNIC	Picnicking
VRC	Visitor Reception Centre
BOATT	Boat Tours
MALADYS	Malady Head Day-Use Area
STAY	Length of Stay
TTRAIL	Tent Trailer Campers
ONEWAY	Electric Hookup

APPENDIX C

NEWMAN SOUND CAMPGROUND RECAPITALIZATION

COSTS ESTIMATES

COSTS COMMON TO OPTION A & B

DESCRIPTION	COSTS ESTIMATES	
TOILET BUILDINGS - 3 Units		
Ceramic Tile Floors Base - Washrooms	$14,400	
Re-Wire the New Entrance	7,722	
Handicapped Accessibility	1,500	
Additional Showers	90,000	
Additional 10% Contirgency	$113,622	$124,984
KITCHEN SHELTERS - 11 Units		
New Electrical, Entrance Panel	$11,000	
Replace Existing Vertical Logs With C.C.A. Treated Logs - Only As Required - Estimate Only	33,000	
Flooring, Parititions as Required	22,000	
Additional 10% Contingency	$66,000	$72,600
TOILET SHOWER BUILDINGS - 12 Units		
Replace Shower Stalls	$54,648	
Ceramic Tile Floor, Base - 42,5 m./Unit	85,000	
Pl. Laminated Toilet Partitions	86,220	
New Electrical Entrance Panel	12,000	
Handicapped Accessibility	6,000	
Additional 10% Contingency	$243,868	$268,255
FIREHOSE CABINETS		35,200
DISPOSAL FILEDS IN LIEU OF LEACHING PITS		105,600
DISHWATER DISPOSAL UNITS		181,500
DISPOSAL FIELD-TRAILER DUMPING STATION		11,000
GATE VALUES		14,300
TELEPHONE SERVICE		5,500
ENGINEERING SERVICES/PROFESSIONAL DESIGN		100,000
TOTAL		$918,939

COSTS COMMON TO OPTION A & B

DESCRIPTION	COSTS ESTIMATES
SITE RELATED WORKS	
SITE FACILITIES	
Site Rehabilitation - 13 AREAS	$77,000
CAMPSITE REHABILITATION - 330 SITES	
Gravel Spur, Sod Campsite, Posts/Car Stops, Garbage Can	545,000
PEDESTRIAN CIRCULATION	
Safety Directional, Handicapped Accessible	36,300
GENERAL VEGETATIVE REHABILITATION OF TOTAL CAMPGROUND AREA - APPROX. 55 HA @ 3640/HA	200,200
Ground Preparation, Ground Cover Planting, Forestry Planting Large Tree Transplanting, Fencing	
PLAYGROUND	
Replace Existing	32,000
New Playgrounds	40,000
UPGRADE CAMPGROUND ENTRANCE	
Signage, Pathways, Minor Road Relignment	33,000
SUB-TOTAL	$963.500
ROADS	
MAIN LOOP RD 1700 X 6.5 M.	
LOOPS A&B 600 X 6.5 M.	
REHAB AND UPGRADE	
Chipseal	209,000
TOTAL	$1 172.500

TOTAL COSTS OF OPTIONS

DESCRIPTION		COSTS ESTIMATES
OPTION "A"		
(from p. 81)		$ 918,939
(from p. 82)		1 172,500
	TOTAL	**$2 091,439**
OPTION "B"		
(from p. 81)		$ 918,939
(from p. 82)		1 172,500
Additional Gate Values		13,200
Electrical Service to Sites c/w Stab-Lok Units		467,500
Water Service to Sites		321,750
	TOTAL	**$2 893,889**